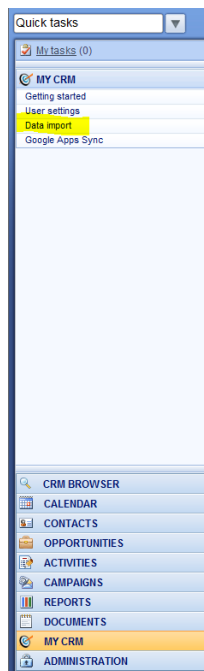




SprinxCRM

How to import contacts from xls file

- 1) Open your SprinxCRM and go to My CRM in the left panel
- 2) Open Data import page, click Contacts -> Data Import



- 3) Download xls file template from Import page

(you can also look at <http://sprinxcrm.com/help/en/howto/>, section Data Import)

Note: [download xls import template file here](#)

<http://www.sprinxcrm.com/supportportal/KB/a29/how-to-import-contacts-from-excel.aspx> .

- 4) Open template file and insert contacts into the file

Attention: Please, follow instructions in the KB article above.

- 5) Select Import type: Contacts from Excel
- 6) Select xls import file with your contacts
- 7) Preview contacts from the XLS file, click Upload

SprinxCRM data import

Import
Cancel
Close
?

Procedure for contact import

1. At first you need to choose import type.
 1. If you want to import contacts into SprinxCRM then you can choose between: „Contacts form Outlook“ or „Contacts from Excel“ import type from import type.
 2. If you want to import contacts into SprinxCRM Campaign you have to choose „Campaign“ import type.

2. Insert contacts into your import file.

For more details check how to import data [guidelines](#), ["import contacts from MS Outlook"](#), ["import contacts from xls file"](#).

Attention: Please note there are specific rules how to put data into XLS template. In order to get company or person records imported properly you need to follow the guideline ["How to import company or person from xls file"](#).

Note: [download xls import template file here](#)

3. Use the Select button to choose import file.
4. Use the Upload button to upload the file.
5. Select Sheet name where are the data for import. Note: the default sheet name is „Import“.
6. Check mapping logic and the file content.
7. Use the Import button to import data into SprinxCRM.

Import type: Contacts from Excel Imported file: Select Upload

- 8) Confirm contacts import, click Import
- Alternatively select sheet with contact data and click Import.

SprinxCRM data import

Import
Cancel
Close
?

Procedure for contact import

1. At first you need to choose import type.
 1. If you want to import contacts into SprinxCRM then you can choose between: „Contacts form Outlook“ or „Contacts from Excel“ import type from import type.
 2. If you want to import contacts into SprinxCRM Campaign you have to choose „Campaign“ import type.

2. Insert contacts into your import file.

For more details check how to import data [guidelines](#), ["import contacts from MS Outlook"](#), ["import contacts from xls file"](#).

Attention: Please note there are specific rules how to put data into XLS template. In order to get company or person records imported properly you need to follow the guideline ["How to import company or person from xls file"](#).

Note: [download xls import template file here](#)

3. Use the Select button to choose import file.
4. Use the Upload button to upload the file.
5. Select Sheet name where are the data for import. Note: the default sheet name is „Import“.
6. Check mapping logic and the file content.
7. Use the Import button to import data into SprinxCRM.

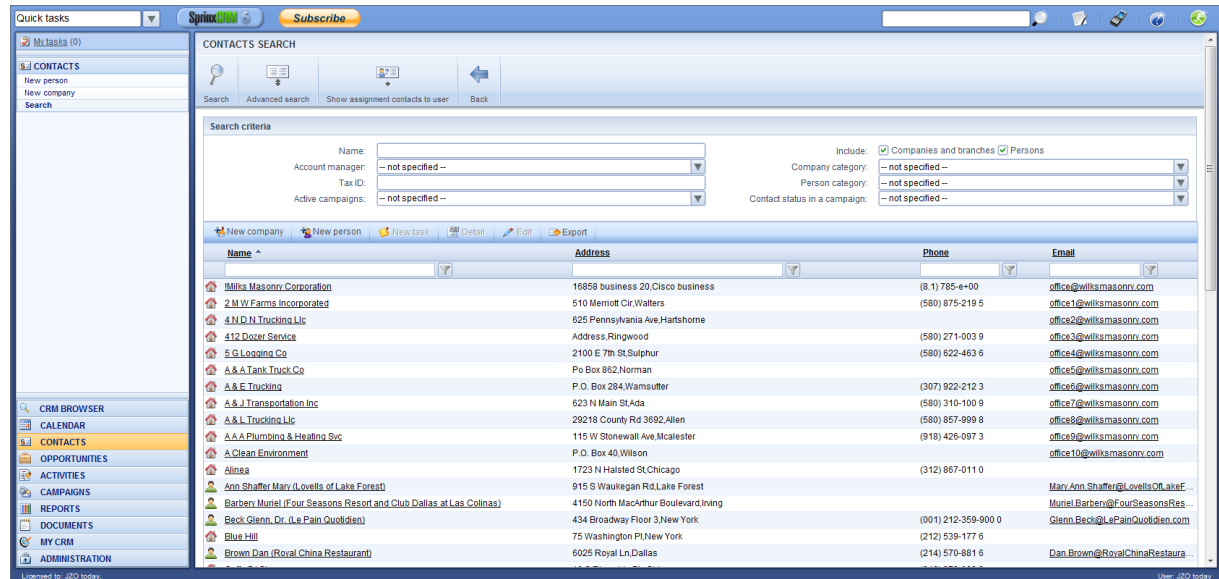
Import type: Contacts from Excel Imported file: Select Upload

Sheet name: Sheet1

The selected sheet contains following data:

Company	Corporate name	Tax ID	Other ID	First name	Last name	Title before	Title after	Position	Salutation	Sex	Phone office	Phone private	Phone mobil	Fax office	Fax private	Email office	Email pr
Miks Masonry Corporation	Miks Mansory	12345	2010/01								(8.1)785-4+00			(8.8)258-8122		office@wiksmasonry.com	
2 M W Farms Incorporated	2MW Farms	12345	2010/02								(580)875-2195					office1@wiksmasonry.com	
4 N D N Trucking Llc	4NDN Trucking	US-12345	2011/32													office2@wiksmasonry.com	
412 Dozer Service	412 Dozer										(580)271-0039					office3@wiksmasonry.com	
5 G Logging Co	5G Logging										(580)622-4636					office4@wiksmasonry.com	
A & A Tank Truck Co														(405)288-6440		office5@wiksmasonry.com	
A & E Trucking											(307)922-2123					office6@wiksmasonry.com	
A & J Transportation Inc											(580)310-1009					office7@wiksmasonry.com	
A & L Trucking Llc											(580)857-9998					office8@wiksmasonry.com	
A A A Plumbing & Heating Svc											(918)426-0973			(918)423-4477		office9@wiksmasonry.com	
A Clean Environment														(5.8)066-8e+0		office10@wiksmasonry.com	

9) View imported contacts in SprinxCRM



The screenshot shows the SprinxCRM interface with the 'CONTACTS SEARCH' page active. The search criteria form includes fields for Name, Account manager, Tax ID, and Active campaigns, all set to '- not specified -'. The 'Include' section has checkboxes for 'Companies and branches' and 'Persons', both checked. The search results are displayed in a table with the following columns: Name, Address, Phone, and Email.

Name	Address	Phone	Email
Milks Masonry Corporation	16858 business 20, Cisco business	(8 1) 785-6-00	office@wilksmasonry.com
2 M W Farms Incorporated	510 Merritt Cir, Walters	(580) 875-219 5	office1@wilksmasonry.com
4 N D N Trucking LLC	625 Pennsylvania Ave, Hartshome		office2@wilksmasonry.com
412 Dozer Service	Address, Ringwood	(580) 271-003 9	office3@wilksmasonry.com
5 G Logging Co	2100 E 7th St, Sulphur	(580) 622-463 6	office4@wilksmasonry.com
A & A Tank Truck Co	Po Box 862, Norman		office5@wilksmasonry.com
A & E Trucking	P. O. Box 284, Wamsutter	(307) 922-212 3	office6@wilksmasonry.com
A & J Transportation Inc	623 N Main St, Ada	(580) 310-100 9	office7@wilksmasonry.com
A & L Trucking LLC	29218 County Rd 3692, Allen	(580) 857-999 8	office8@wilksmasonry.com
A A A Plumbing & Heating Svc	115 W Stonewall Ave, McAlester	(918) 426-097 3	office9@wilksmasonry.com
A Clean Environment	P. O. Box 40, Wilson		office10@wilksmasonry.com
Almasa	1723 N Halsted St, Chicago	(312) 867-011 0	
Ann Shaffer Mair (Lovells of Lake Forest)	915 S Waukegan Rd, Lake Forest		Mair, Ann.Shaffer@LovellsOfLakeF...
Barben Muriel (Four Seasons Resort and Club Dallas at Las Colinas)	4150 North MacArthur Boulevard, Irving		Muriel.Barben@FourSeasonsRes...
Beck Glenn, Dr. (Le Pain Quotidien)	434 Broadway Floor 3, New York	(001) 212-359-900 0	Glenn.Beck@LePainQuotidien.com
Blue Hill	75 Washington Pl, New York	(212) 539-177 6	
Brown Dan (Royal China Restaurant)	6025 Royal Ln, Dallas	(214) 570-881 6	Dan.Brown@RoyalChinaRestaura...