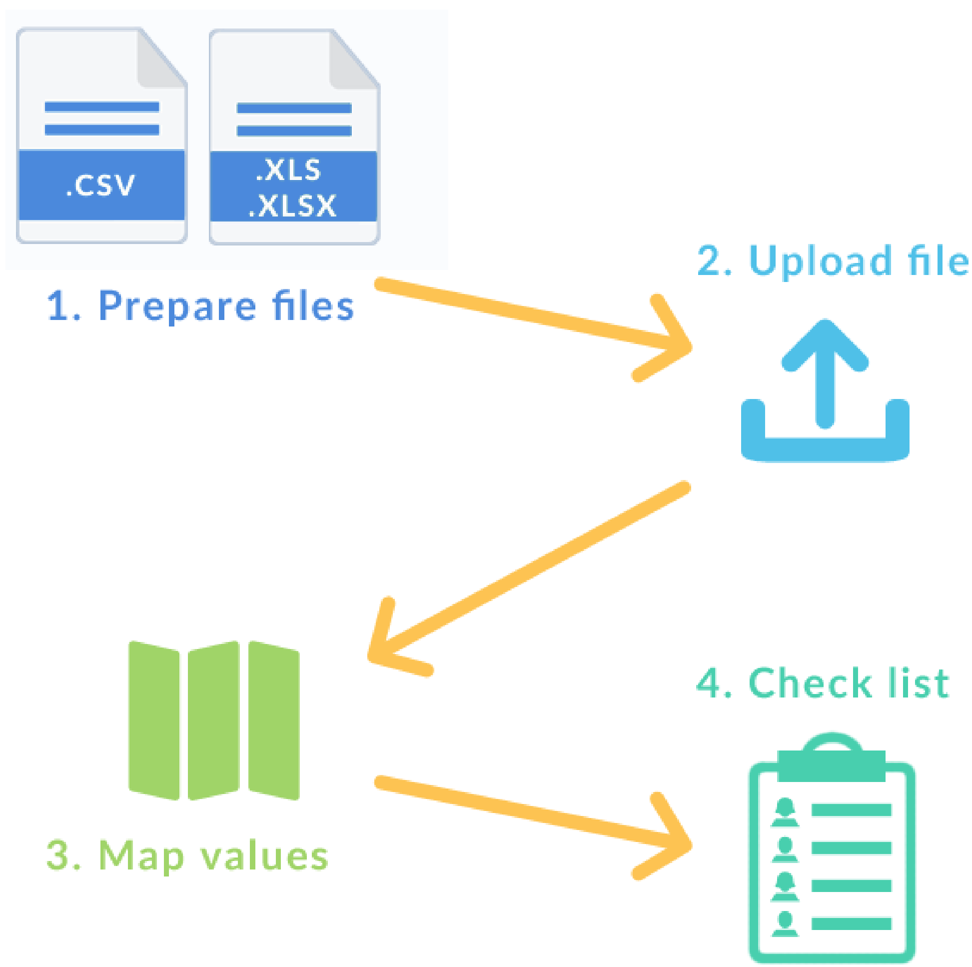
Moffice CRM Importing Contacts

Introduction

Moffice CRM cuts down on data entry time through bulk importing contacts. For Leads, Potentials, and Customers, users can upload .CSV or Excel (.XLS, .XLSX) files and instantly create a multitude of relevant contact entries. Importing contacts is one of the first steps you should take to take existing contact data and bulk add it to Moffice CRM. It is important to add contacts as soon as possible so you can start collecting sales Activity History for each contact and subsequently start seeing insight as to the strengths and weaknesses of your sales process.

The import process involves a few simple steps, as shown below.



Step 1. Setting up the Import File

Preparing an import file is easy. First, open your Excel (.XLS, .XLSX) or .CSV file and separate related fields by commas or columns and save. It might look a little bit like this:

Company Name	Company Phone	Company Website	Date Added	Name	Title	Gender	Mobile	User Email	Employees
Strongtex	555-553-0500	strongtex.us	9/1/2015	Scott Jones	Manager	M	555-554-5500	scottj@strongtex.us	524
Transzap	555-553-0499	transzap.us	9/1/2015	Roy McDougal	CEO	M	555-554-5499	roym@transzap.us	5425
Zimplanet	555-553-0498	zimplanet.us	9/1/2015	Jenny Prince	Sales Rep	F	555-554-5498	jennyp@zimplanet.us	124
Betaline	555-553-0497	betaline.us	9/2/2015	Darla Quinton	Director	F	555-554-5497	darlaq@betaline.us	23
Hotdox	555-553-0496	hotdox.us	9/2/2015	Charlene Wilkins	Manager	F	555-554-5496	charlenew@hotdox.us	3
Keyplex	555-553-0495	keyplex.us	9/3/2015	Belle Rodriguez	CFO	F	555-554-5495	beller@keyplex.us	2
Apquote	555-553-0494	apquote.us	9/3/2015	Nicola Fung	Sales Rep	F	555-554-5494	nicolaf@apquote.us	6
Faxzap	555-553-0493	faxzap.us	9/3/2015	Rina Swanson	Manager	F	555-554-5493	rinas@faxzap.us	3
Lotware	555-553-0492	lotware.us	9/3/2015	Greg Washington	COO	M	555-554-5492	gregw@lotware.us	6346

*Note: You must create separate files for Customers, Potentials, and Leads.

When setting up your file, there are a few rules to keep in mind.

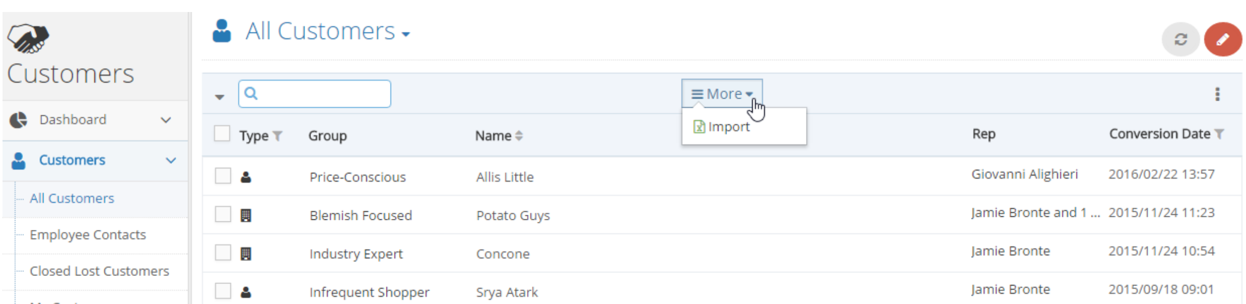
1. For company contacts, the **company name** is a required field.
For individual contacts, the contact's **name** is required.

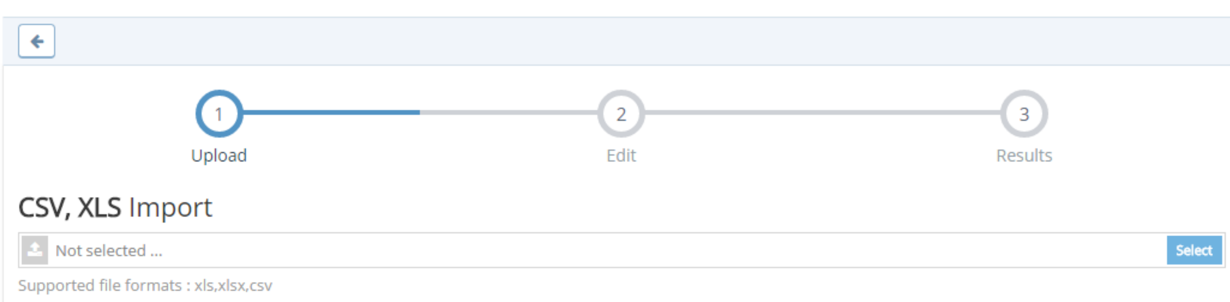
2. Gender must be displayed as a single letter— "M" for males and "F" for females.

3. Dates must be entered in the format [Year-Month-Date] like so: **[2016-02-24]**
Also, note that if there is no column for "Date Added" (the date when the contact was added to the database), then that day's date/the current date will be used.

Step 2. Uploading the Import File

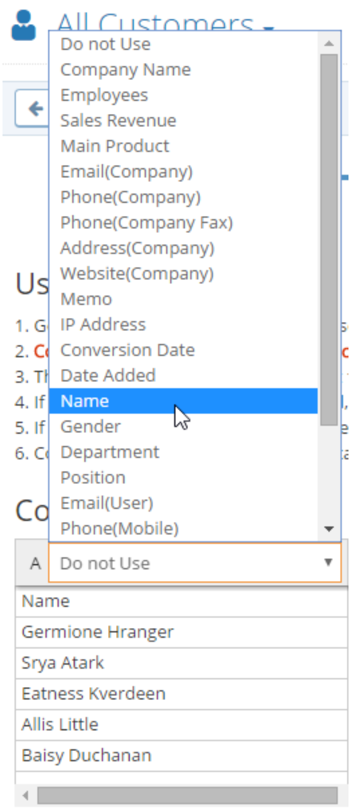
Now that your file is ready, you can start importing. Go to any Customer, Potential, or Leads list menu and start the upload process for the respective file by clicking More > Import. There, select the file that you will be uploading to Moffice CRM.



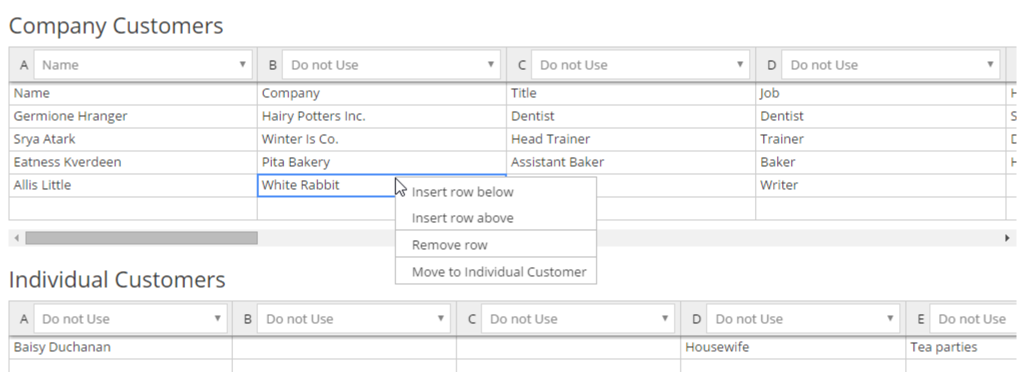


Step 3. Mapping Column Values

The most important part of the import process is correctly mapping values. Each column of the file will have to correspond with a value available from Moffice CRM. Click the pull-down menu above each column to determine its value.



You can also right-click a row to remove, rearrange, or move it to Company Customers / Individual Customers respectively.



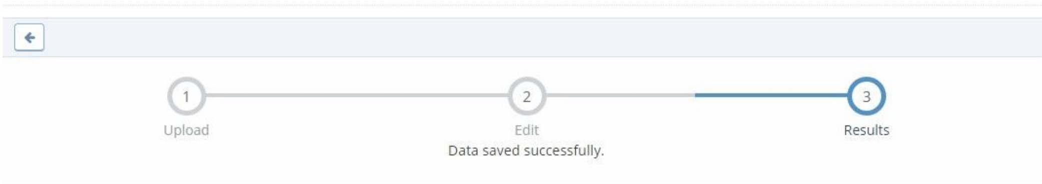
Make sure to fill in a name for each column for both Company and Individual Customers. Select “Do Not Use” for unused columns. Finally, don’t forget to delete the header column with “Name”, “Company”, etc.! After finishing preparations, click “Save” to finish the upload process entirely.

Here is a complete list of the available default fields Moffice CRM offers. Note that any custom fields you add from the Page Layout menu will be added to the respective Company / Individual contact section.

Customers / Potentials / Leads	
Company	Individual
Company Name	Name
Employees	Gender
Sales Revenue	Job
Main Product	Position
Email (Company)	Company
Phone (Company)	Hobbies
Phone (Company Fax)	Email (User)
Address (Company)	Email (Company)
Website (Company)	Phone (Mobile)
Memo	Phone (Telephone (Home))
IP Address	Phone (Fax)
Conversion Date	Anniversary (Birthday)
Date Added	Anniversary (Anniversary)
Name	Address (Home)
Gender	Address (Company)
Department	Website (User)
Position	Website (Company)
Email (User)	Memo
Phone (Mobile)	IP Address
Phone (Telephone (Home))	Conversion Date
Phone (Fax)	Date Added
Anniversary Date (Birthday)	
Anniversary Date (Anniversary)	
Address (Home)	

Step 4. Checking Results

After saving, you should receive a positive confirmation notice.



Now, you can check the respective list of Customers, Potential, or Leads and find the contacts that you just uploaded, complete with the information you provided on their details page.