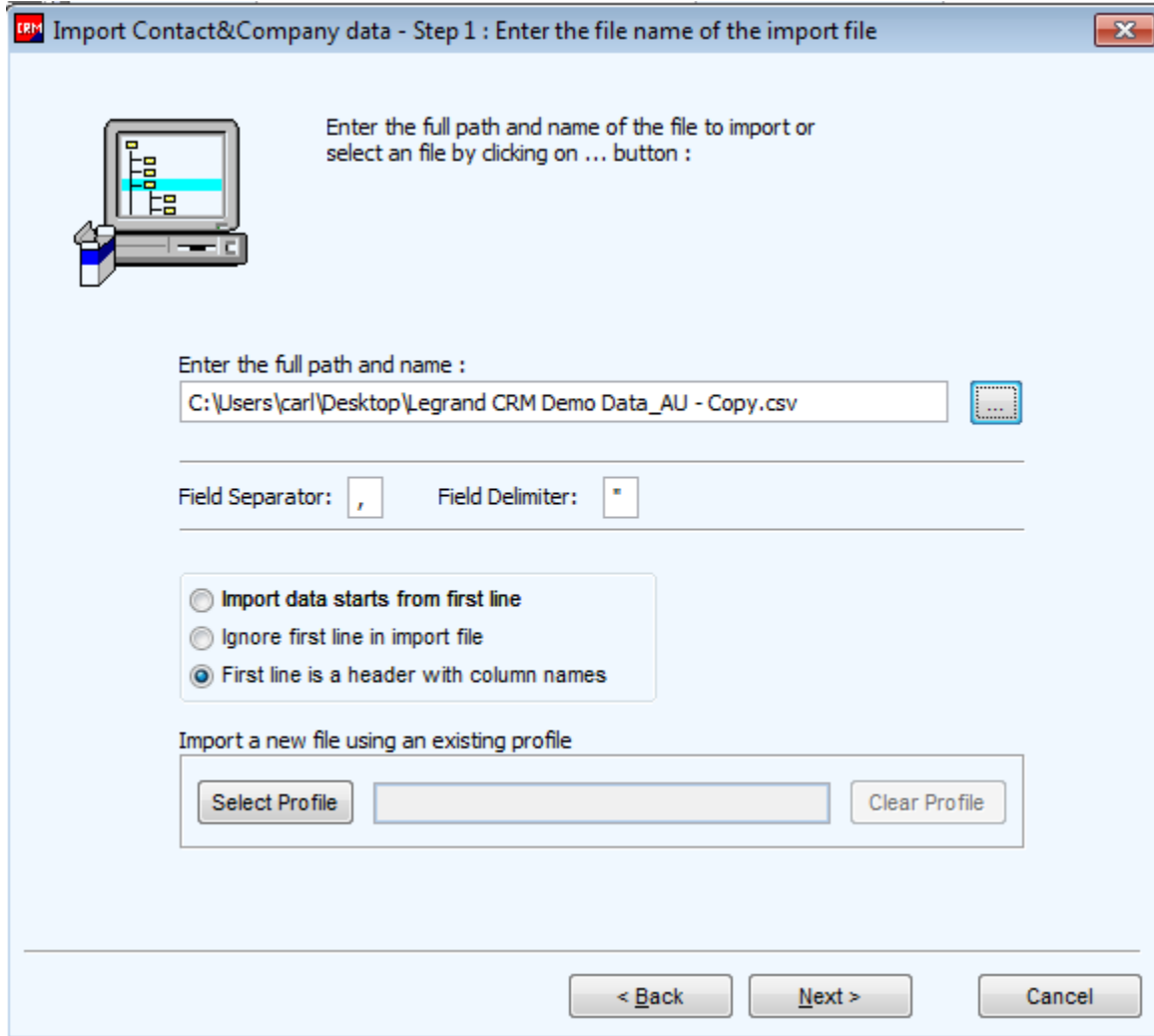


## How to import data into Legrand CRM

### Step 1

Find the CSV file which has been saved onto your PC and select First line is a header with column names



Import Contact&Company data - Step 1 : Enter the file name of the import file

Enter the full path and name of the file to import or select an file by clicking on ... button :

Enter the full path and name :  
C:\Users\carl\Desktop\Legrand CRM Demo Data\_AU - Copy.csv

Field Separator: , Field Delimiter: "

Import data starts from first line  
 Ignore first line in import file  
 First line is a header with column names

Import a new file using an existing profile

Select Profile [ ] Clear Profile

< Back Next > Cancel

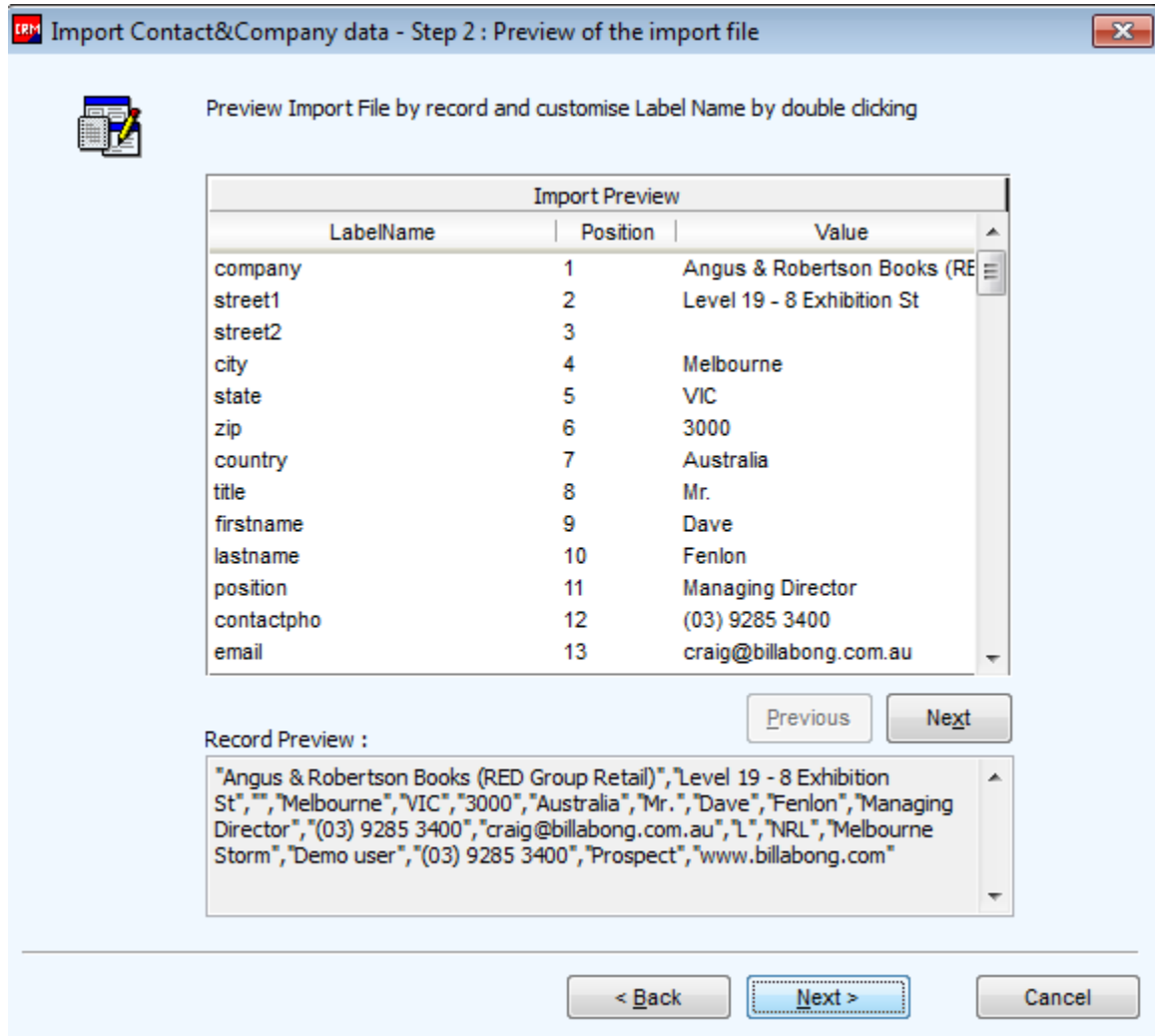
Be aware of the Field separator and delimiter, if these values appear in the CSV data cells then this will have an adverse effect on your data import.

Usually it is recommended that the first line in the header with column names is selected, this would mean that the first row in your CSV data sheet has column headers.

Only select a profile has been saved, see step 5

## Step 2

Shows the data that will be imported, use the next field to review the next record to ensure you are happy with the data.



### Step 3

This is where you map the data to the correct fields.

To do this highlight the importing fields value and select the Legrand CRM Field to map to and press the arrow button to establish the link.

CRM Import Contact&Company data - Step 3 : Map import fields to LegrandCRM fields

Map importing fields to corresponding LegrandCRM fields by clicking on > or < buttons .  
The Contact Last Name and Company Name are the minimum mandatory fields.

Importing Fields
CompanyName
CompanyStreet
CompanyCity
CompanyPostCode
CompanyState
CompanyPhone
Cont_Firstname
Cont_lastname
ContactPhone
ContactUser1

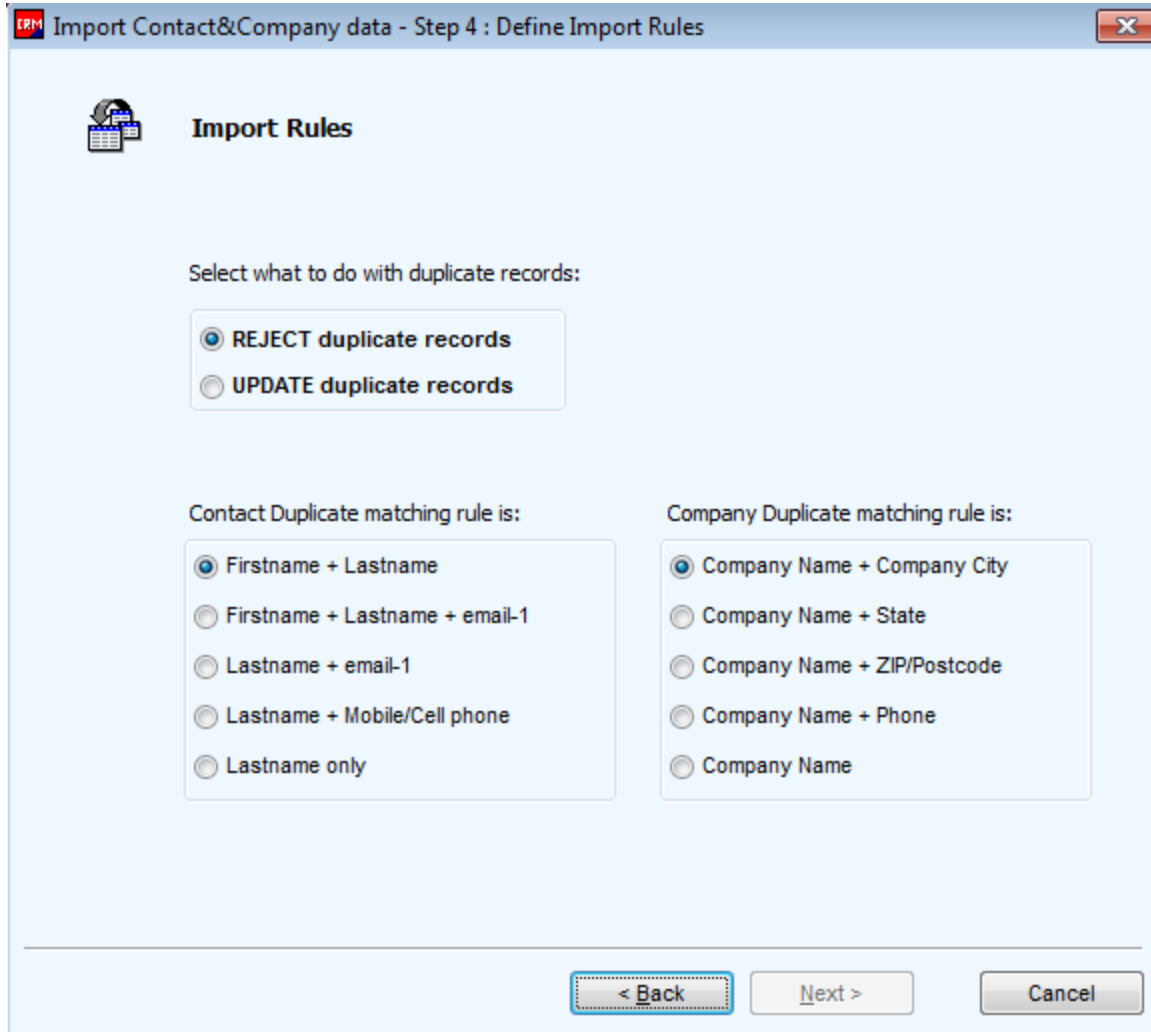
Contacts Table	
Legrand CRM Field	Mapped Import Field
Title	
FirstName	
LastName	
Position	
Phone1	
Phone2	
Fax	
Mobile	
Email1	

Companies Table	
Legrand CRM Field	Mapped Import Field
Company Name	CompanyName
Street	
Street2	
Street3	
City	
State	
Postcode	
Mailing Street	
Mailing Street2	

< Back   Next >   Cancel

## Step 4

This step will check for duplicates in the Legrand CRM database, you can specify the rules to check for duplicates and the action to follow. Do you update the Legrand CRM database value with that from the CSV spreadsheet or do you reject the value from the CSV spreadsheet.



**Import Rules**

Select what to do with duplicate records:

- REJECT duplicate records
- UPDATE duplicate records

Contact Duplicate matching rule is:

- Firstname + Lastname
- Firstname + Lastname + email-1
- Lastname + email-1
- Lastname + Mobile/Cell phone
- Lastname only

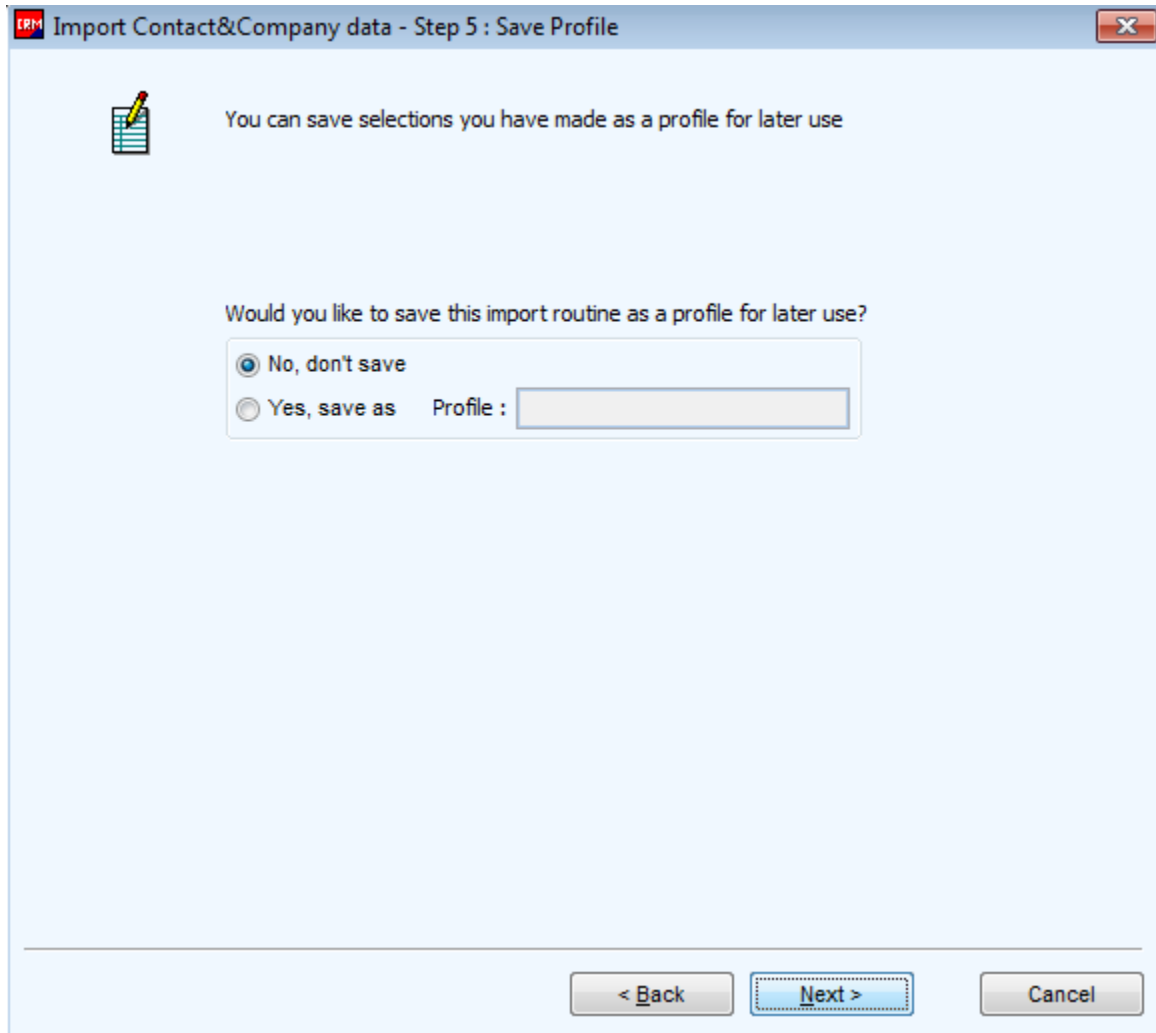
Company Duplicate matching rule is:

- Company Name + Company City
- Company Name + State
- Company Name + ZIP/Postcode
- Company Name + Phone
- Company Name

< Back   Next >   Cancel

## Step 5 – Saving the profile

Should you be importing data on a continuing basis then it would be wise to save the profile, this will mean that in step 1 you can call upon the profile and not have to re map the fields again in step 3.



The screenshot shows a dialog box titled "Import Contact&Company data - Step 5 : Save Profile". The dialog has a light blue background and a standard Windows-style title bar with a close button (X) in the top right corner. On the left side, there is a small icon of a notepad with a pencil. The main text reads: "You can save selections you have made as a profile for later use". Below this, a question is posed: "Would you like to save this import routine as a profile for later use?". There are two radio button options: "No, don't save" (which is selected) and "Yes, save as". To the right of the "Yes, save as" option is a text input field labeled "Profile :". At the bottom of the dialog, there are three buttons: "< Back", "Next >" (which is highlighted with a blue border), and "Cancel".