

SuiteCRM Field & Panel Importer

**User Guide** 

Field & Panel Importer

Outright

## **User Guide:-**

**1.** From admin panel open the field importer settings and read the all instructions carefully before proceeding further.

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	Search Modules			
	Select the module(s) that users will be able to search against using the Global Search.		Installation instruction (please follow strictly)	]
	Elasticsearch		1. Download file using below link	
	Configure Elasticsearch preferences		2. Use the same columns for fields, label and type 3. Click on Quick Repair and Rebuild	
Bugs Main	tain a list of releases for your product. Active releases are displayed in the Releases drop-down menus in bug re	cords created within the Bugs module.	4. Click on repair and execute Download Sample File	]
۲	Releases		Select Any Module	
	Manage releases and versions		Select file:	
CSV	to Field Importer Outright Store		Choose File No file chosen	
- 5	Upload CSV file to import Field & Panel		SURMIT	
	->Upload CSV file to import Field & Panel			

**2.** Now download the sample CSV file to have an idea of structure and layout of the format.

A	B	C	D	E	F	G	
ield Name	Field Label	Field Type	Panel Name				
tandard id c	Standard id	varchar	Account Info				Installation instruction (please follow strictly)
kills_c	Skills	varchar	Account Info				
icture c	Person Picture	varchar	Account Info				1. Download file using below link
emails c	Other Emails	varchar	Account Info				2. Use the same columns for fields, label and type
hones c	Other Phone Numbers	varchar	Account Info				3. Click on Quick Repair and Rebuild
inkedin c	Linkedin	varchar	Account Info				4. Click on repair and execute
acebook c	Facebook	varchar	Account Info				
witter c	Twitter	varchar	Account Info				Download Sample File
s_responsive_c	Is Responsive	varchar	Account Info				
ead_type_c	Lead Type	varchar	Account Info				Select Any Module
ps_c	IPs	varchar	Account Info				District Party Module
referrers_c	Referrer Pages	varchar	Account Info				
anding_pages_c	Landing Pages	varchar	Account Info				Select file:
risited_dates_c	Visited Dates	varchar	Account Info				Choose File No file chosen
risited_pages_c	Visited Pages	varchar	Account Info				
rears_at_cur_company_c	Years at Current Company	varchar	Account Info				
ource_id_c	Person ID in the Source System	varchar	Account Info				SUBMIT
son_response_c	Person JSON Data	text	Json Info				
eplies_json_c	Replies JSON Data	text	Json Info				
note_c	Note	text	Coming soon				
account_standard_id_c	Account Standard id	varchar	Coming soon				© Supercharged by SuiteCRM © Powered By SugarCRM @ Server response time: 0.04 seconds.
source_account_id_c	Account ID in the Source System	varchar	Coming soon				
account_employees_size_c	Account Employees Size	varchar	Coming soon				
account_revenue_c	Account Revenue	varchar	Coming soon				
account_type_c	Account Type	varchar	Coming soon				
account_founded_c	Account Date Founded (year)	varchar	Coming soon				
account_industry_c	Account Industry	varchar	Coming soon				
account_linkedin_c	Account Linkedin	varchar	Coming soon				
ccount_twitter_c	Account Twitter	varchar	Coming soon				
iccount_facebook_c	Account Facebook	varchar	Coming soon				
eccount_emails_c	Account Emails	varchar	Coming soon				
account_phones_c	Account Phones	varchar	Coming soon				
account_logo_c	Account Logo	varchar	Coming soon				
account_json_response_c	Account JSON Data	text	Coming soon				

**3.** Before uploading CSV file you can see Task module has no new panel and Field. Now upload the formatted CSV file and Submit.

≡ номе↓		≡ tasks <del>v</del>			
Installation instruction ( please follow strictly)  1. Download file using below link 2. Use the same columns for fields/Jabel and type 3. Click on repair and execute  Download Sample File  Taks  Subset file  Subs		FIELDS & PA TASK OVERVIEW Subject: Start Date: Due Date: Priority: Description:	ANEL IMPORTER - PL	Status: Accounts Contact:	Completed
© Supercharged by SuiteCRM © Powered By SugarCRM @Server response time: 0.02 seconds.	ВАСК ТО ТОР 🔺	♪ NOTES A SECURITY GROUP	S.		+

**4.** Perform Quick repair & rebuild. Then you will see fields and panel showing in the tasks module.

REPAIR	Standard id:	Skills:
Quick Repair and Rebuild	Person Picture:	Other Emails:
Repairs and rebuilds DB, Extensions, Vardefs, SuiteCRM Dashlets etc.	Other Phone Numbers:	Linkedin:
Expand Column Width		Facebook:
Expands certain char, varchar and text columns in database (MSSQL ONLY)	Twitter:	Is Responsive:
Rebuild.htaccess File	Lead Type:	IPs:
Rebuilds.htaccess to limit access to certain files directly	Referrer Pages:	Landing Pages:
Rebuild Config File	Visited Dates:	Visited Pages:
Rebuilds config.php by updating version and adding defaults when not explicitly declared	Years at Current Company:	Person ID in the Source System:
Rebuild Relationships		
Rebuilds relationship metadata and drops the cache file	JSON INFO	-
Rebuild Schedulers		
Rebuilds out-of-the-box Scheduler Jobs	Person JSON Data:	Replies JSON Data:
Rebuild SuiteCRM Dashlets	COMING SOON	-
Rebuilds the SuiteCRM Dashlets cache file	COMING SOON	
Rebuild Javascript Languages	Note:	Account Standard id:
Rebuilds javascript versions of language files	Account ID in	Account
Rebuild JS Compressed Files	the Source System:	Employees Size:
Copies original Full JS Source files and replaces existing compressed JS files		Revenue: Activate Windows Go to Settings to activate Windows.
Rebuild JS Grouping Files	Account Type:	Account Date Founded (year):

**5.** You can see below mention screen shots, all fields and Panel match successfully.

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Field Name	Field Label	C Claid Turns	Panel Name	E	F	G		
	Standard id	Field Type		1				
standard_id_c		varchar	Account Info				Standard id:	Skills:
skills_c	Skills	varchar	Account Info					
picture_c	Person Picture	varchar	Account Info				Person Picture:	Other Emails:
emails_c	Other Emails	varchar	Account Info					11 A A A A A A A A A A A A A A A A A A
phones_c	Other Phone Numbers	varchar	Account Info				Other Phone Numbers:	Linkedin:
linkedin_c	Linkedin	varchar	Account Info				Thursday .	
facebook_c	Facebook	varchar	Account Info				Facebook:	Twitter:
twitter_c	Twitter	varchar	Account Info					
is_responsive_c	Is Responsive	varchar	Account Info				Is Responsive:	Lead Type:
l lead_type_c	Lead Type	varchar	Account Info					
2 ips_c	IPs	varchar	. Account Info				IPs:	Referrer Pages:
referrers_c	Referrer Pages	varchar	Account Info					
landing_pages_c	Landing Pages	varchar	Account Info				Landing Pages:	Visited Dates:
visited_dates_c	Visited Dates	varchar	Account Info					
5 visited_pages_c	Visited Pages	varchar	Account Info				Visited Pages:	Years at Current
7 years_at_cur_company_c	Years at Current Company	varchar	Account Info				visiteu Pages.	Company:
source_id_c	Person ID in the Source System	varchar	Account Info					
json_response_c	Person JSON Data	text	Json Info			-	Person ID in the	
replies_json_c	Replies JSON Data	text	Json Info				Source System:	
1 note_c	Note	text	Coming soon					
account_standard_id_c	Account Standard id	varchar	Coming soon					
source_account_id_c	Account ID in the Source System	varchar	Coming soon				JSON INFO	
account_employees_size_c	Account Employees Size	varchar	Coming soon					
account_revenue_c	Account Revenue	varchar	Coming soon					
6 account_type_c	Account Type	varchar	Coming soon				Person JSON Data:	Replies JSON Data:
7 account_founded_c	Account Date Founded (year)	varchar	Coming soon					
account_industry_c	Account Industry	varchar	Coming soon					
account_linkedin_c	Account Linkedin	varchar	Coming soon					
account_twitter_c	Account Twitter	varchar	Coming soon					
account_facebook_c	Account Facebook	varchar	Coming soon					le le
account_emails_c	Account Emails	varchar	Coming soon					
account_phones_c	Account Phones	varchar	Coming soon					
account_logo_c	Account Logo	varchar	Coming soon				COMING SOON	
account_ison_response_c	Account JSON Data	text	Coming soon					
5								
7							Note:	Account Standard Id:
R							Note:	Account Standard Id: