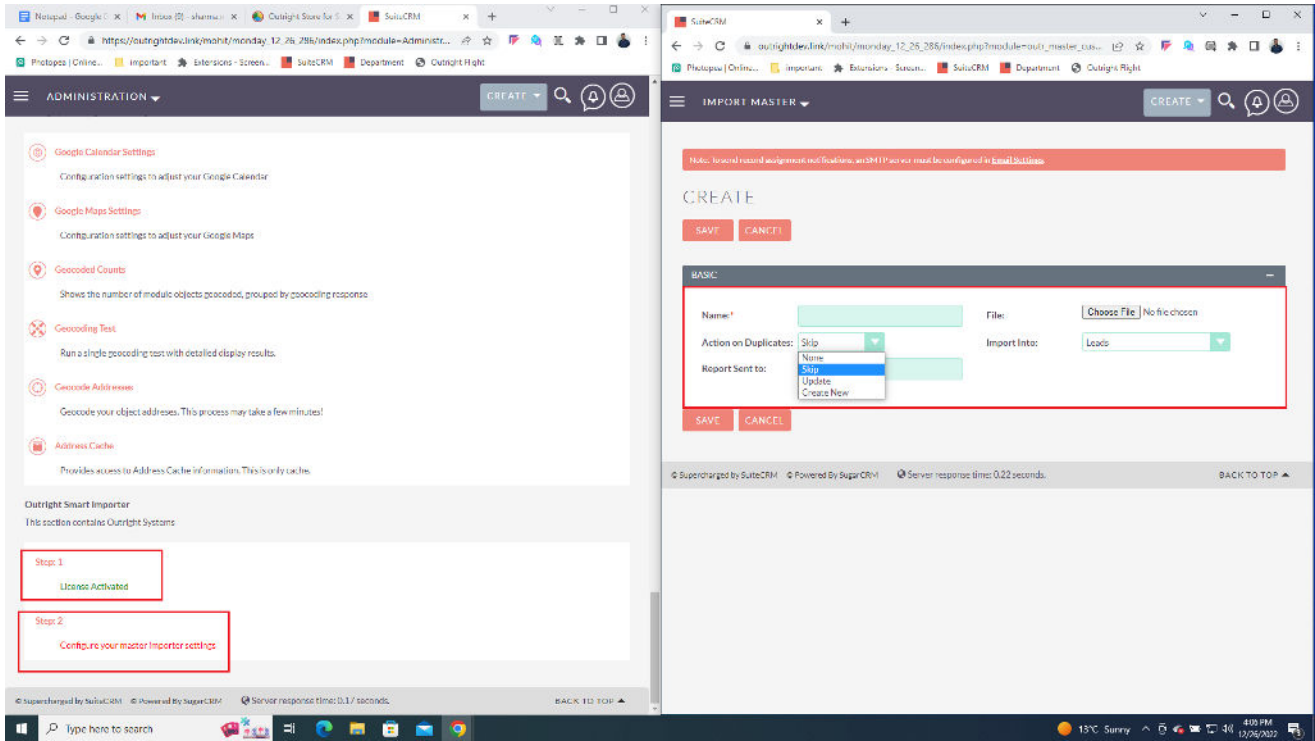




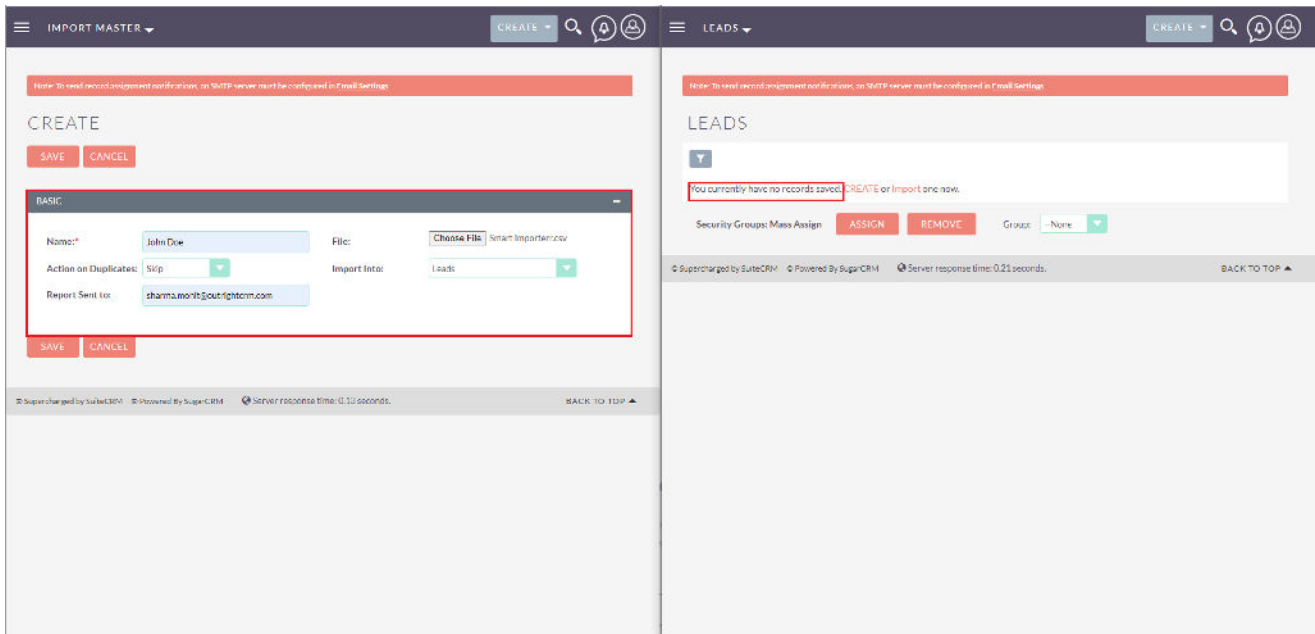
SuiteCRM Smart Importer

User Guide

1. Once the license is activated, you need to configure the import settings.



2. Choose a CSV file from which you want to import data and choose what to do if duplicates are found.



- Once you save the setting, all records from CSV will be uploaded to the SuiteCRM module. You can undo it if you want. In the audit subpanel, you can check how many records are imported and how many are left.

The screenshot shows the 'IMPORT MASTER' interface for 'JOHN DOE'. A red box highlights the 'Undo' button in the 'ACTIONS' menu. Another red box highlights the 'RECORDS/AUDIT' section, which displays the following statistics:

Total Records in File:	199	Remaining Records:	0
Records Processed:	199	Duplicate Records:	

The 'LEADS' subpanel on the right shows a list of 199 records with columns for Name, Department, Mobile, Status, and Date Created.

- You will also get a report in the email comprising details of imported records.

The screenshot shows an email report titled 'Custom Import Completed for John Doe' from SuiteCRM. A red box highlights the summary statistics:

Total Records in File:	199
Total Created Records:	199
Total Duplicate Records Found:	
Remaining Records:	0

The main body of the email contains a table with the following columns: #, First Name, Last Name, Record Status, Record Module, and Import Number.

#	First Name	Last Name	Record Status	Record Module	Import Number
1	ROBERT	KITZINGER	created	Leads	1115
2	KOBLN	ULAK	created	Leads	1115
3	SKILLICHEN	BRIDEN	created	Leads	1115
4	SCOTT	MCCOBBY	created	Leads	1115
5	DALE	SOLIMSKIB	created	Leads	1115
6	TONIA	GOODICE	created	Leads	1115
7	GERALD	MALONE	created	Leads	1115
8	DAVID	SCHMIDT	created	Leads	1115
9	MARIE	SPAUDLING	created	Leads	1115
10	CAROLYN	FREEMER	created	Leads	1115
11	SHERRI	STANLEY	created	Leads	1115
12	ROSANNA	SWANER	created	Leads	1115
13	SYBIL	LIJ	created	Leads	1115
14	WANDA	LOVELL	created	Leads	1115
15	LEE	GATES	created	Leads	1115
16	DEBORA	LUMLEY	created	Leads	1115
17	THELMA	BOOSE	created	Leads	1115
18	JOHN	WORLEY	created	Leads	1115
19	NEIL	BONCO	created	Leads	1115
20	MARY	CHAML	created	Leads	1115
21	ROBERT	GORMAN	created	Leads	1115
22	DALE	SUTTON	created	Leads	1115
23	SALLY	SHUBINSKI-GILH	created	Leads	1115
24	SHARON	ROBINSON	created	Leads	1115
25	DONALD	SANTINO	created	Leads	1115
26	JOSPH	SLARINSKI-JE	created	Leads	1115
27	ELIZABETH	STEPHENS	created	Leads	1115
28	GIORGIANNE	RUFF	created	Leads	1115