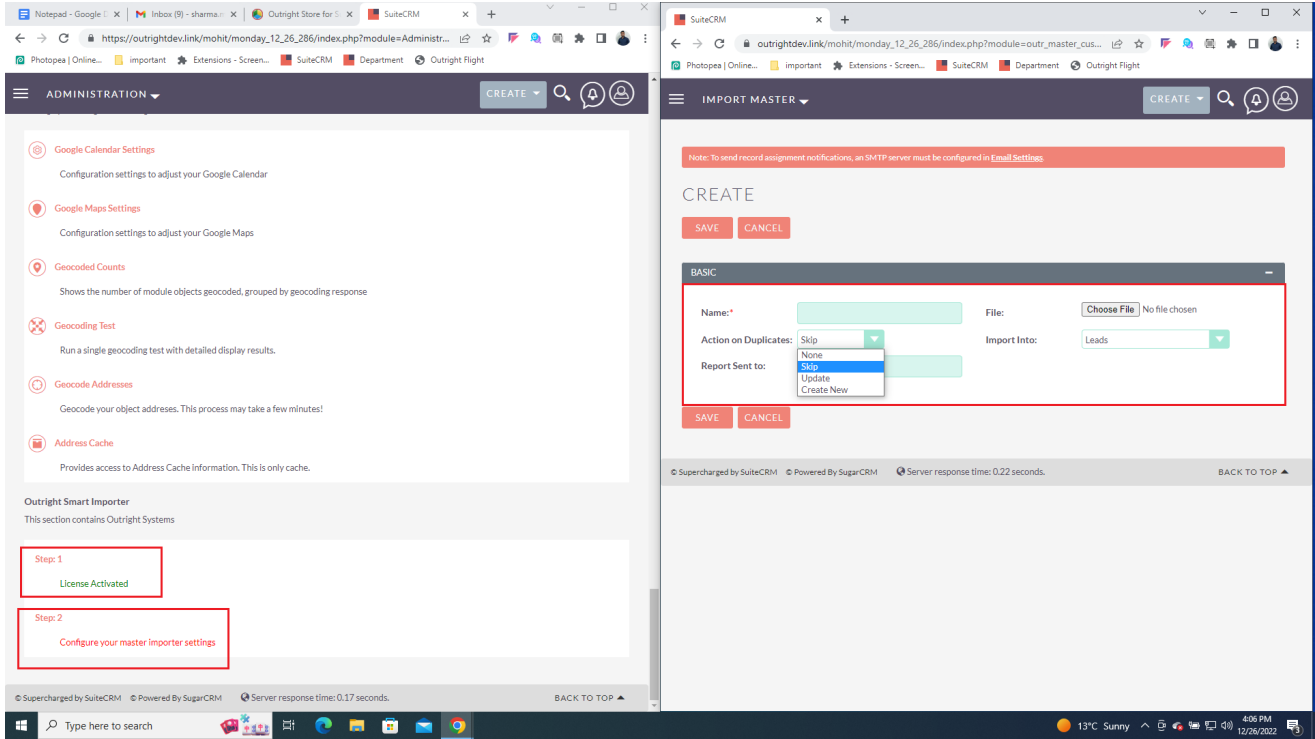




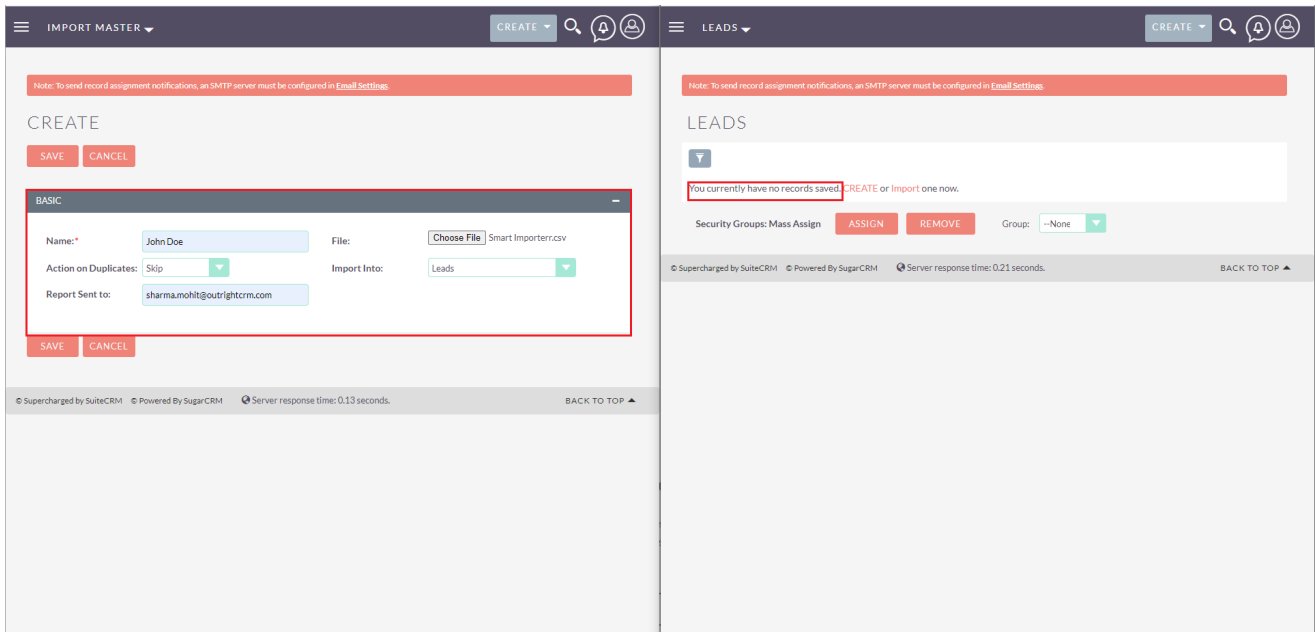
**SuiteCRM Smart Importer**

**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.



3. 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 SuiteCRM interface. On the left, the 'IMPORT MASTER' panel is visible, showing the 'JOHN DOE' record. The 'File' field is set to 'Smart Importer.csv'. Below this, the 'RECORDS AUDIT' subpanel shows: Total Records in File: 199, Records Processed: 199, Remaining Records: 0, and Duplicate Records: 0. On the right, the 'LEADS' list is displayed, showing a table of leads with columns for Name, Department, Mobile, Status, and Date Created. The first few rows include DONNA VALENTE, JOHN GAEBLER, LINDA HEAD, DENISE DOLIN, JEFFREY SEATON, DAVID FINNEY JR, REX GULDENBECHER, VICTOR MANCINELLI, WALLACE GRAY JR, WILLIAM GILMORE, JERAL REMBUSCH, JOE MURELLO, WANDA LOVELL, DEBRA LUMLEY, MARJORIE KIMES, WADE RADEMACHER, MARCIA DOUGHERTY, JOHN DEARTH, PAMELA KLEZMER, and ERIC OEHLEH. The 'Date Created' column for all leads is 12/26/2022 10:43.

4. 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. The report includes a summary: Total Records in File: 199, Total Created Records: 199, Total Duplicate Records Found: 0, and Remaining Records: 0. Below the summary is a table of imported records 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	KAREN	BLAKE	created	Leads	1115
3	GRETCHEN	BROWN	created	Leads	1115
4	SCOTT	MCQUROY	created	Leads	1115
5	DALE	SCHENKEL JR	created	Leads	1115
6	TONJA	GOODLOE	created	Leads	1115
7	GERALD	MALONE	created	Leads	1115
8	DAVID	SCHNUR	created	Leads	1115
9	MARK	SPAUDLING	created	Leads	1115
10	CAROLYN	FELDMER	created	Leads	1115
11	SHERRI	STANLEY	created	Leads	1115
12	BARBARA	SAVADER	created	Leads	1115
13	CYRIL	LJ	created	Leads	1115
14	WANDA	LOVELL	created	Leads	1115
15	LJ	GATES	created	Leads	1115
16	DEBRA	LUMLEY	created	Leads	1115
17	THERESA	BOESE	created	Leads	1115
18	JOHN	WOERLY	created	Leads	1115
19	NEIL	RONCO	created	Leads	1115
20	MARY	CRANE	created	Leads	1115
21	ROBERT	GORMAN	created	Leads	1115
22	ANITA	SUTTON	created	Leads	1115
23	REX	GULDENBECHER	created	Leads	1115
24	SHARON	ROBINSON	created	Leads	1115
25	DONALD	SARTINO	created	Leads	1115
26	JOSEPH	SLABINSKI JR	created	Leads	1115
27	ELIZABETH	STEPHENS	created	Leads	1115
28	GEORGIANNE	BUBB	created	Leads	1115