

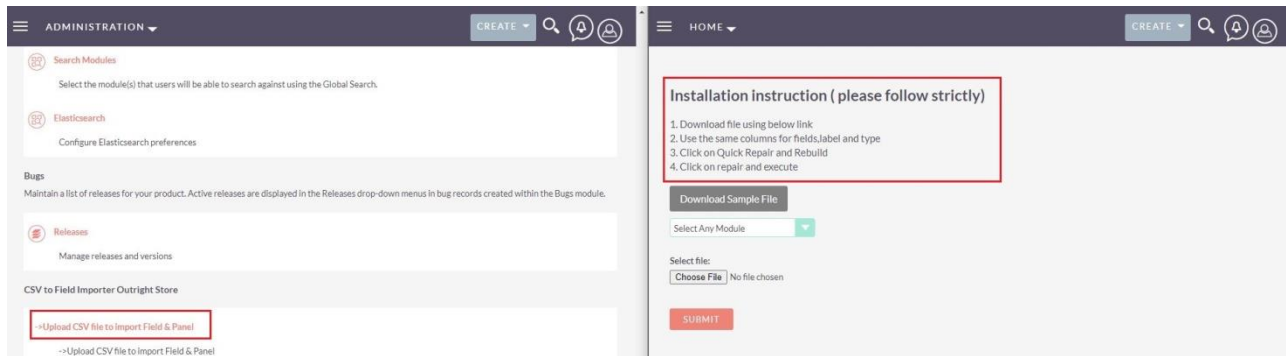


SuiteCRM Field & Panel Importer

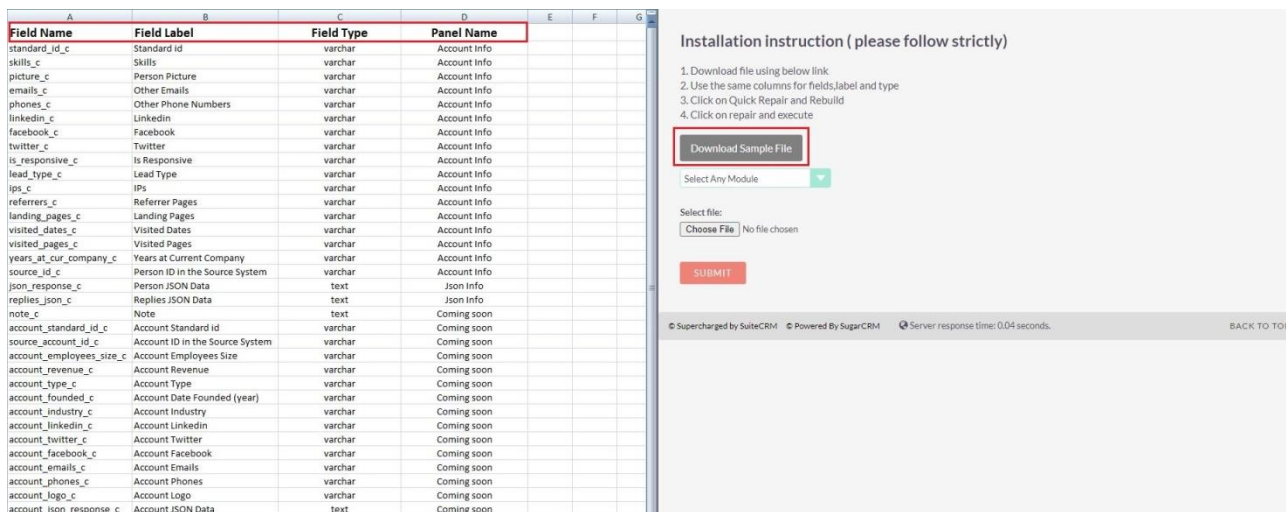
User Guide

User Guide:-

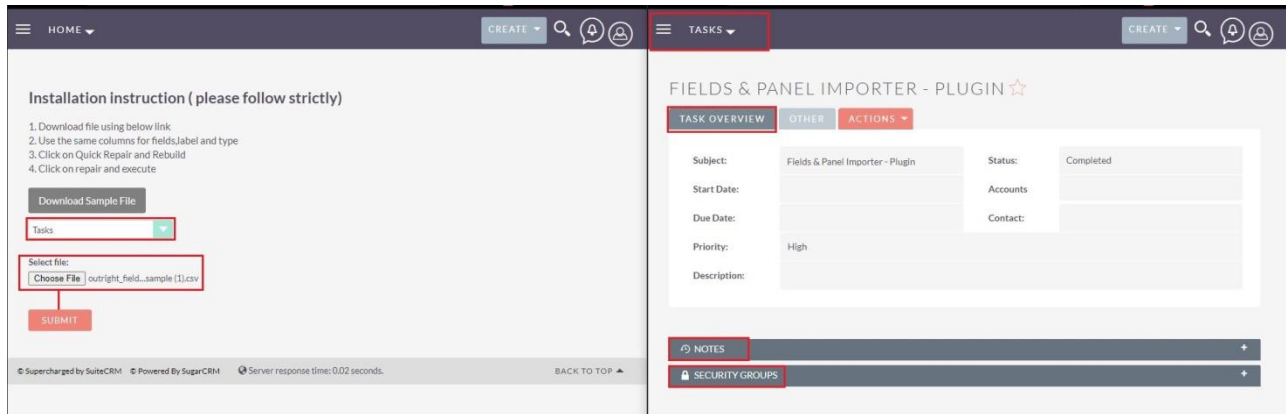
1. From admin panel open the field importer settings and read the all instructions carefully before proceeding further.



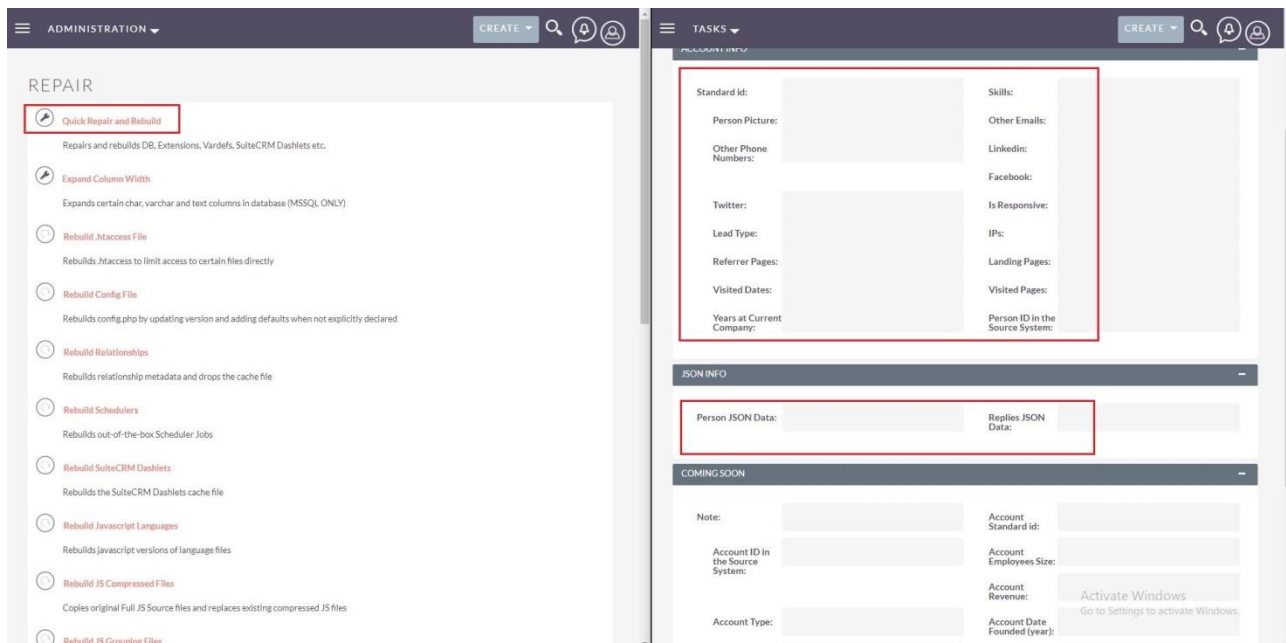
2. Now download the sample CSV file to have an idea of structure and layout of the format.



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



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



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

The image shows a side-by-side comparison of a spreadsheet and a user interface. The spreadsheet on the left lists various fields with their labels, types, and corresponding panel names. The user interface on the right shows a form with sections for 'ACCOUNT INFO', 'JSON INFO', and 'COMING SOON', where each field from the spreadsheet is mapped to a specific input field in the form.

Field Name	Field Label	Field Type	Panel Name
standard_id_c	Standard id	varchar	Account Info
skills_c	Skills	varchar	Account Info
picture_c	Person Picture	varchar	Account Info
emails_c	Other Emails	varchar	Account Info
phones_c	Other Phone Numbers	varchar	Account Info
linkedin_c	LinkedIn	varchar	Account Info
facebook_c	Facebook	varchar	Account Info
twitter_c	Twitter	varchar	Account Info
is_responsive_c	Is Responsive	varchar	Account Info
lead_type_c	Lead Type	varchar	Account Info
ips_c	IPs	varchar	Account Info
referrers_c	Referrer Pages	varchar	Account Info
landing_pages_c	Landing Pages	varchar	Account Info
visited_dates_c	Visited Dates	varchar	Account Info
visited_pages_c	Visited Pages	varchar	Account Info
years_at_cur_company_c	Years at Current Company	varchar	Account Info
source_id_c	Person ID in the Source System	varchar	Account Info
json_response_c	Person JSON Data	text	Json Info
replies_json_c	Replies JSON Data	text	Json Info
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
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
account_twitter_c	Account Twitter	varchar	Coming soon
account_facebook_c	Account Facebook	varchar	Coming soon
account_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

The user interface on the right is divided into three sections:

- ACCOUNT INFO:** Contains input fields for Standard id, Skills, Person Picture, Other Emails, Other Phone Numbers, LinkedIn, Facebook, Twitter, Is Responsive, Lead Type, IPs, Referrer Pages, Landing Pages, Visited Dates, Visited Pages, and Years at Current Company.
- JSON INFO:** Contains input fields for Person JSON Data and Replies JSON Data.
- COMING SOON:** Contains input fields for Note and Account Standard id.