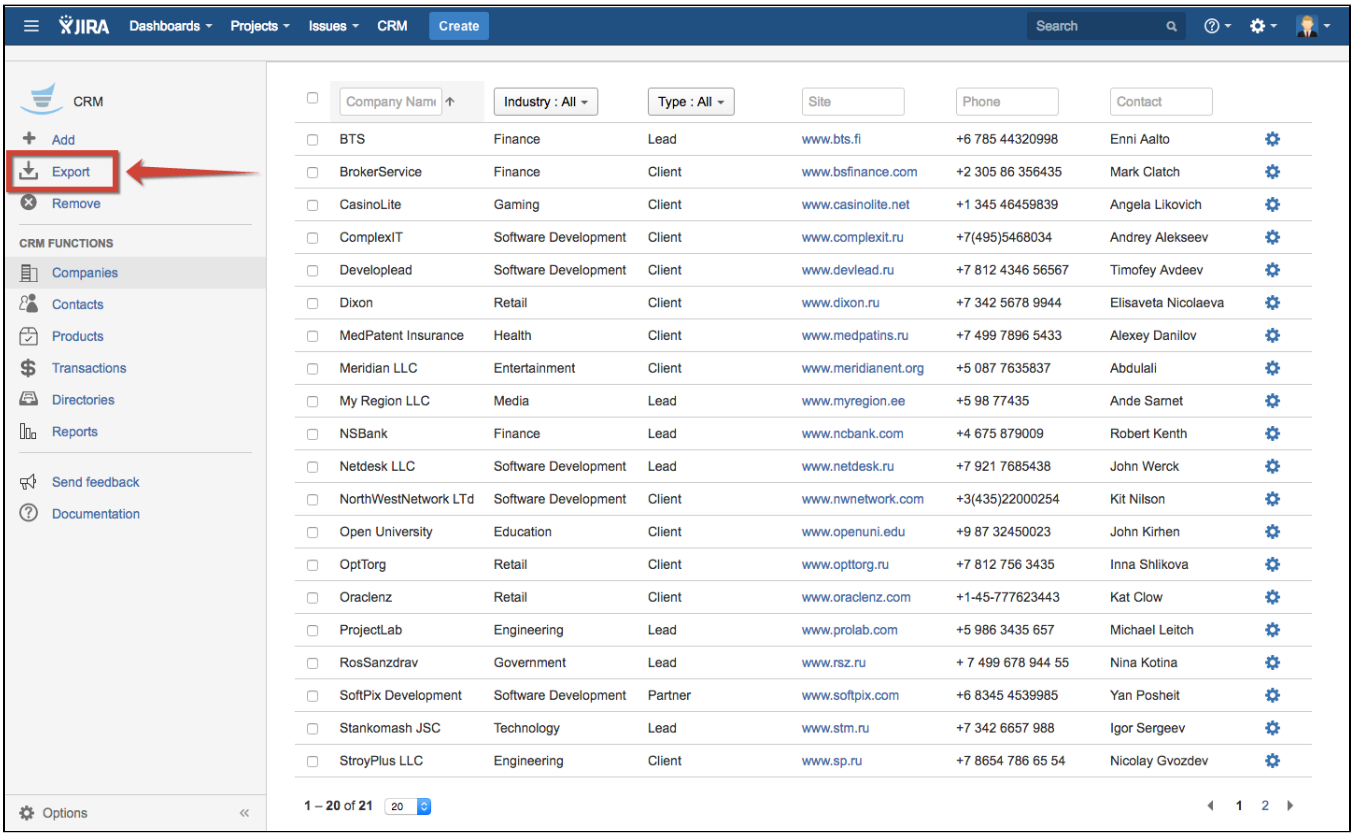
Importing/Exporting Data

Exporting data from dictionaries

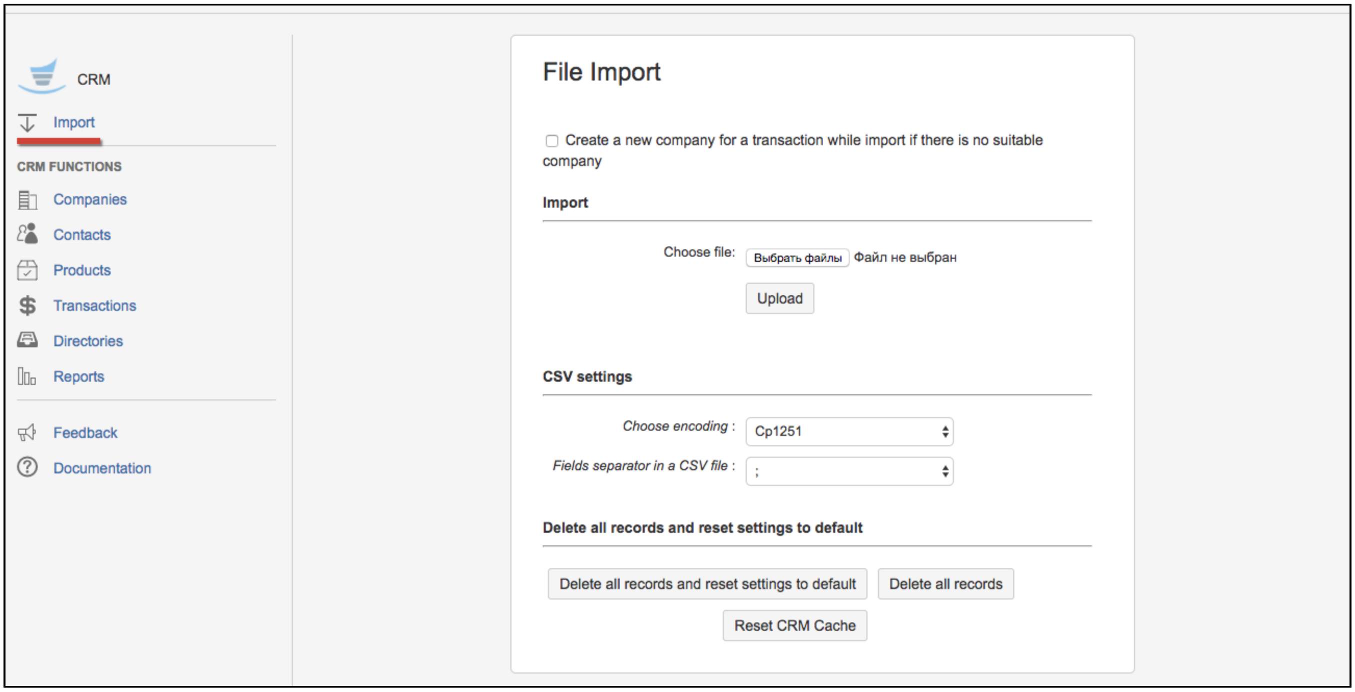
Data from any CRM dictionary can be exported into csv (Excel) file. To do it just click on the export icon in the dictionary toolbar. If no data is selected, all records from current directory will be exported. You can specify which records you need to be exported by checking records checkboxes, also enabling checkbox on the top selects all data below.



All the fields will be exported in the table and additional (hidden in CRM view) row "Updated" will be shown with date and time of last updates of each element.

You can put ticks in checkboxes to export only records you need.

You can choose separator for data in csv file: semicolon (;) or comma (,). If data is separated by commas all records are placed into double quotes (""). This setting is adjusted in CRM /Import, CSV Setting section:



Importing data into dictionaries

In the **"CRM/Import"** menu there is capability of importing data from csv into dictionaries.

Csv (excel) template file for uploading can be received by exporting data from dictionaries as written above (even if there is no data).

Before import

- Delete row "Updated"
- If you use text redactor to edit .csv file make sure that the data is separated with semicolon (;) or comma (,) accordingly to CSV settings
- Check that captions for Companies do not match captions for Contacts fields

Use 'restrict duplicates' property for attribute that you don't want to be repeated during import.

Differences between export and import files for **Transactions**:

System attribute	Export	Import
Sale	issue key with summary	only issue key without summary
Date	23.08.16	23.08.2016
Direction	expence	credit
	income	debet

Notice that Transactions by default are identified by Date while import so it is better to make unique custom key in transactions attributes (properties -> 'Is title') to have ability to import transactions with the same date.

Use checkbox 'Create a new company for a transaction while import if there is no suitable company' to create new Company in CRM Companies Directory if you import transactions where client is new company not listed in your CRM. If unchecked transaction with new company name will not be imported.

Importing Issues with CRM Custom Fields to JIRA from CSV

Please notice that issue csv import with CRM custom fields should be done after importing options from CRM directory to CRM Custom Fields.