

Importing/Exporting Data

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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.

The screenshot shows the JIRA CRM interface. On the left sidebar, the 'CRM' section is expanded, and the 'Export' button is highlighted with a red box and a red arrow. The main table displays a list of companies with columns for Company Name, Industry, Type, Site, Phone, and Contact. The table is filtered by 'All' for Industry and Type. The bottom of the table shows pagination: '1 - 20 of 21' and a dropdown menu set to '20'.

<input type="checkbox"/>	Company Name	Industry	Type	Site	Phone	Contact	
<input type="checkbox"/>	BTS	Finance	Lead	www.bts.fi	+6 785 44320998	Enni Aalto	⚙
<input type="checkbox"/>	BrokerService	Finance	Client	www.bsfinance.com	+2 305 86 356435	Mark Clatch	⚙
<input type="checkbox"/>	CasinoLite	Gaming	Client	www.casinolite.net	+1 345 46459839	Angela Likovich	⚙
<input type="checkbox"/>	ComplexIT	Software Development	Client	www.complexit.ru	+7(495)5468034	Andrey Alekseev	⚙
<input type="checkbox"/>	Developlead	Software Development	Client	www.develead.ru	+7 812 4346 56567	Timofey Avdeev	⚙
<input type="checkbox"/>	Dixon	Retail	Client	www.dixon.ru	+7 342 5678 9944	Elisaveta Nicolaeva	⚙
<input type="checkbox"/>	MedPatent Insurance	Health	Client	www.medpatins.ru	+7 499 7896 5433	Alexey Danilov	⚙
<input type="checkbox"/>	Meridian LLC	Entertainment	Client	www.meridianent.org	+5 087 7635837	Abdulali	⚙
<input type="checkbox"/>	My Region LLC	Media	Lead	www.myregion.ee	+5 98 77435	Ande Sarnet	⚙
<input type="checkbox"/>	NSBank	Finance	Lead	www.ncbank.com	+4 675 879009	Robert Kenth	⚙
<input type="checkbox"/>	Netdesk LLC	Software Development	Lead	www.netdesk.ru	+7 921 7685438	John Werck	⚙
<input type="checkbox"/>	NorthWestNetwork LTd	Software Development	Client	www.nwnnetwork.com	+3(435)22000254	Kit Nilson	⚙
<input type="checkbox"/>	Open University	Education	Client	www.openuni.edu	+9 87 32450023	John Kirhen	⚙
<input type="checkbox"/>	OptTorg	Retail	Client	www.opttorg.ru	+7 812 756 3435	Inna Shlikova	⚙
<input type="checkbox"/>	Oraclenz	Retail	Client	www.oraclenz.com	+1-45-777623443	Kat Clow	⚙
<input type="checkbox"/>	ProjectLab	Engineering	Lead	www.prolab.com	+5 986 3435 657	Michael Leitch	⚙
<input type="checkbox"/>	RosSanzdrav	Government	Lead	www.rsz.ru	+7 499 678 944 55	Nina Kotina	⚙
<input type="checkbox"/>	SoftPix Development	Software Development	Partner	www.softpix.com	+6 8345 4539985	Yan Posheit	⚙
<input type="checkbox"/>	Stankomash JSC	Technology	Lead	www.stm.ru	+7 342 6657 988	Igor Sergeev	⚙
<input type="checkbox"/>	StroyPlus LLC	Engineering	Client	www.sp.ru	+7 8654 786 65 54	Nicolay Gvozdev	⚙

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	expenche	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](#).