

Importing (Companies)

Overview

Importing any data from a template can only be done by the Account Owner Admin. The templates will be provided and are simply .csv files with a header row. This document goes over the import process for a list of **Company** records. The process is essentially the same for any import, but the data and template will be different.

Companies via Import Template

Once you have acquired the Import template spreadsheet from the Phaze website:

Step 1. Fill out the information for each **Company** within the template.

#	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Company Name	Company Contact Name	Company Contract Title	Company Contact Email	Company Contact Phone Number	Company Contact Ext Number	Company Contact Mobile Phone Number	Tax ID	Country	Full Address (If not US)	Street Address	City	State	Zip Code
2	Bitcoin	Bill	Mr	email@gmail.com	5555555 x20									
3	Ethereum	Esther	Miss	email@gmail.com	5555555 x50									
4	Litecoin	Larry	Mr	email@gmail.com	5555555 x01									
5	Dogecoin	Dan	Mr	email@gmail.com	5555555 x02									

(Note: All the attributes can be edited and changed once the company is imported.)

Save your .csv file with the company information populated.

Step 2 Slide out the **Right Menu** and select **Import Companies**

You will see the form in Figure 2.

Step 3

Select '**Column mapping is determined by template**', in the drop down select the one option, **Company**.

Check the **Validate Data** box. Leave all other options as they are. For the **Data File**, select the .csv with your user data.

Click **Import**

You will see a success message.

Figure 1 Import Form.