

# Importing and Exporting Contacts

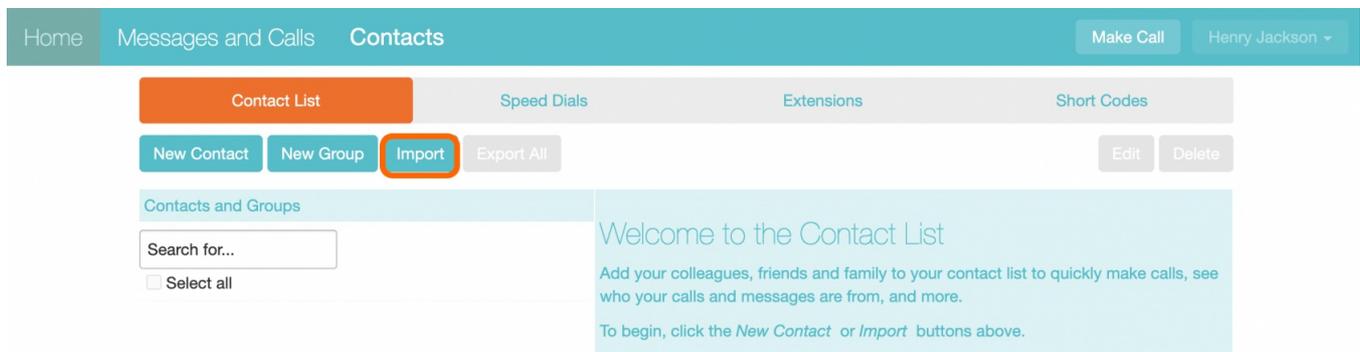
**INFO:** With the CommPortal contacts, these contacts will be sent to all registered devices for that subscriber. This will include the Pod Connect mobile and desktop applications

## Import Contact from CSV

Log into the CommPortal with your credentials, at top click on **Contacts**



Within the Contacts page you will see the following, click on **Import**.



In the **Import Contacts** popup window you will need to:

- Choose the **CSV** file that you would like to Import
- Select the **Action** when a Contact already exists.

### Import Contacts

Select the file to import contacts from and the action to take when the contact exists then press **Import**.

CSV File:

Action when contact exists:

- Overwrite the contact ?
- Duplicate the contact ?
- Ignore imported entry ?

Import status

|          |            |            |            |
|----------|------------|------------|------------|
| added: 0 | updated: 0 | deleted: 0 | ignored: 0 |
|----------|------------|------------|------------|

Note: You currently have 0 contacts. If you reach 1000 during the import, any remaining entries will be ignored.

Click on **Choose file** and select the CSV file you would like to import, select the **Action when contact exists** and then click on **Import**.

Monitor the **Import status** as this will details of the contacts imported.

Once the **Import** has finished, you can either click on **Confirm** this add the contacts to your account, or click on **Details**, this is ideal if you have contacts in your list that have been ignored and will display a reason. After reviewing the **Details** click on **Confirm**.

You can cancel the Import by clicking on **Cancel**.

## Import Contacts

Select the file to import contacts from and the action to take when the contact exists then press **Import**.

CSV File:

Choose file contacts\_slim.csv

Action when contact exists:

- Overwrite the contact ?
- Duplicate the contact ?
- Ignore imported entry ?

Contacts imported

added: 4    updated: 0    deleted: 0    ignored: 0

Note: You currently have 4 contacts.

Details

Confirm

Cancel

You will now see the Contacts imported. You can **Edit** or **Delete** contacts by selecting the relevant Contact and clicking on **Edit** or **Delete**

New Contact

New Group

Import

Export All

Edit

Delete

Contacts and Groups

Jackson, Henry

Search for...

🏠 01132991002

📠 01132991010

Select all

Jim

**Jackson, Henry**

Smith, Jane

Walker, James

**INFO:** Depending on the source of the CSV file you have you may experience issues with Importing contacts correctly. You may see that only the names are display and not the phone numbers. Please use one of the provided templates below.

If you do experience issue using the your CSV then please download one of the following templates. There a 2 versions of this full and minimal. In most cases the minimal version will do as this includes First Name, Last Name, Home Tel, Work Tel, Cell Tel and Fax Tel. The full version includes full address and other contact details.

Click on either of the below to download:

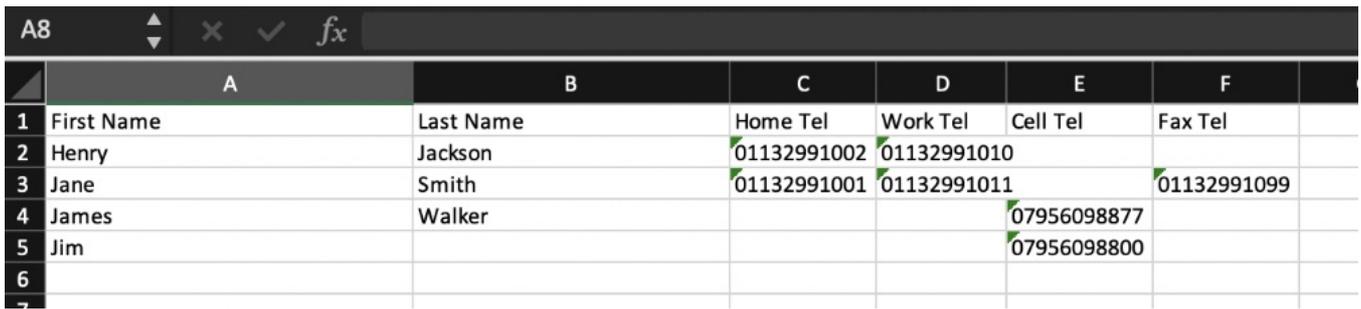
[Contacts Minimal version](#)

[Contacts Full version](#)

You can either edit the header row (line 1 of CSV) to match the below. Excel is ideal for this.

| First Name | Last Name | Home Tel | Work Tel | Cell Tel | Fax Tel |
|------------|-----------|----------|----------|----------|---------|
|------------|-----------|----------|----------|----------|---------|

Or you can just copy the relevant columns into the the template as per the below:



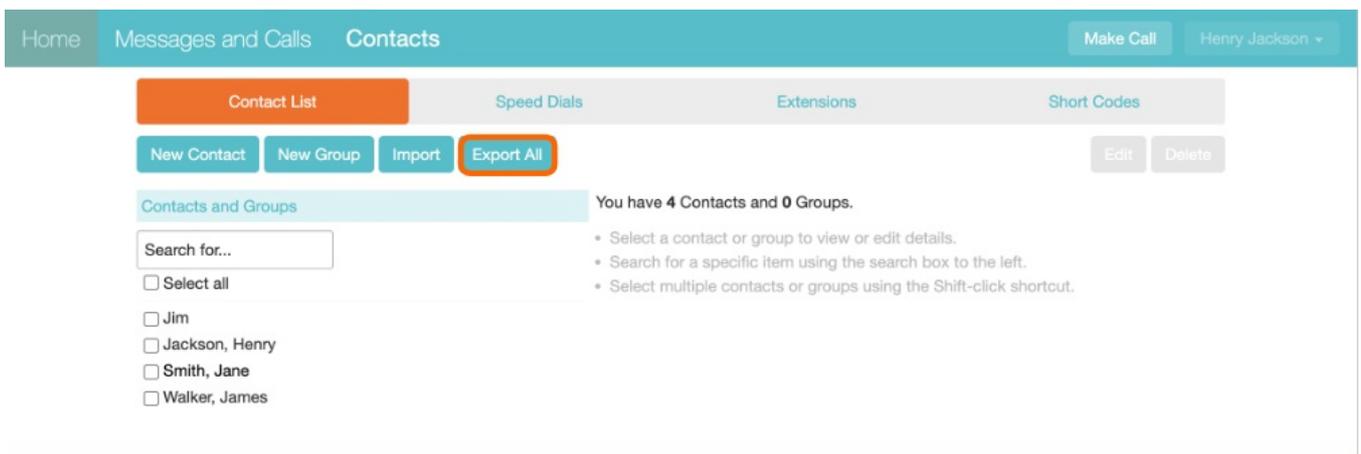
|   | A          | B         | C           | D           | E           | F           |
|---|------------|-----------|-------------|-------------|-------------|-------------|
| 1 | First Name | Last Name | Home Tel    | Work Tel    | Cell Tel    | Fax Tel     |
| 2 | Henry      | Jackson   | 01132991002 | 01132991010 |             |             |
| 3 | Jane       | Smith     | 01132991001 | 01132991011 |             | 01132991099 |
| 4 | James      | Walker    |             |             | 07956098877 |             |
| 5 | Jim        |           |             |             | 07956098800 |             |
| 6 |            |           |             |             |             |             |
| 7 |            |           |             |             |             |             |

Once you have finished making the changes save the file as a CSV and follow the above instructions to import.

**INFO: First Name and Last Name columns are limited to 32 characters each**

### Exporting Contacts

Within the **Contacts** page click on **Export All**.



The screenshot shows a web interface with a teal header bar containing 'Home', 'Messages and Calls', and 'Contacts'. On the right of the header are 'Make Call' and 'Henry Jackson' buttons. Below the header is a navigation bar with 'Contact List' (highlighted in orange), 'Speed Dials', 'Extensions', and 'Short Codes'. Under 'Contact List' are buttons for 'New Contact', 'New Group', 'Import', and 'Export All' (highlighted with an orange border). To the right are 'Edit' and 'Delete' buttons. Below this is a search box labeled 'Search for...' and a list of contacts with checkboxes: 'Select all', 'Jim', 'Jackson, Henry', 'Smith, Jane', and 'Walker, James'. To the right of the list, it says 'You have 4 Contacts and 0 Groups.' and lists instructions: 'Select a contact or group to view or edit details.', 'Search for a specific item using the search box to the left.', and 'Select multiple contacts or groups using the Shift-click shortcut.'

Next select the format that you would like the Contacts to be exported.

- Outlook/Outlook Express compatible - Select this option to import them into Outlook
- Windows Contacts on Vista - This was only for Windows Vista contacts. Should not be used unless you are still using Windows Vista.
- Native format - Select this one to have the contacts exported as a CSV file.

Once selected, click on **Export**. The file will automatically be downloaded.

## Export Contacts

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Select the export mode, and press **Export**.

Export mode  Outlook/Outlook Express compatible

Export status  Windows Contacts on Vista

Native format

Export

Cancel

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