Importing and Exporting Contacts

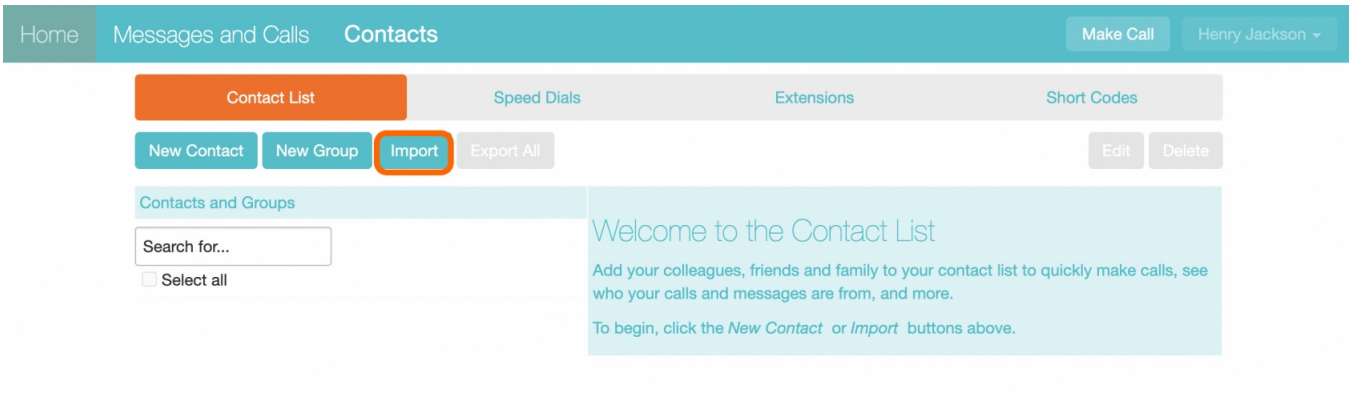
INFO: With the CommPortal contacts, these contacts will be sent to all registered devices for that subscriber. This will include the Pod Connect mobile and desktop applications

Import Contact from CSV

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

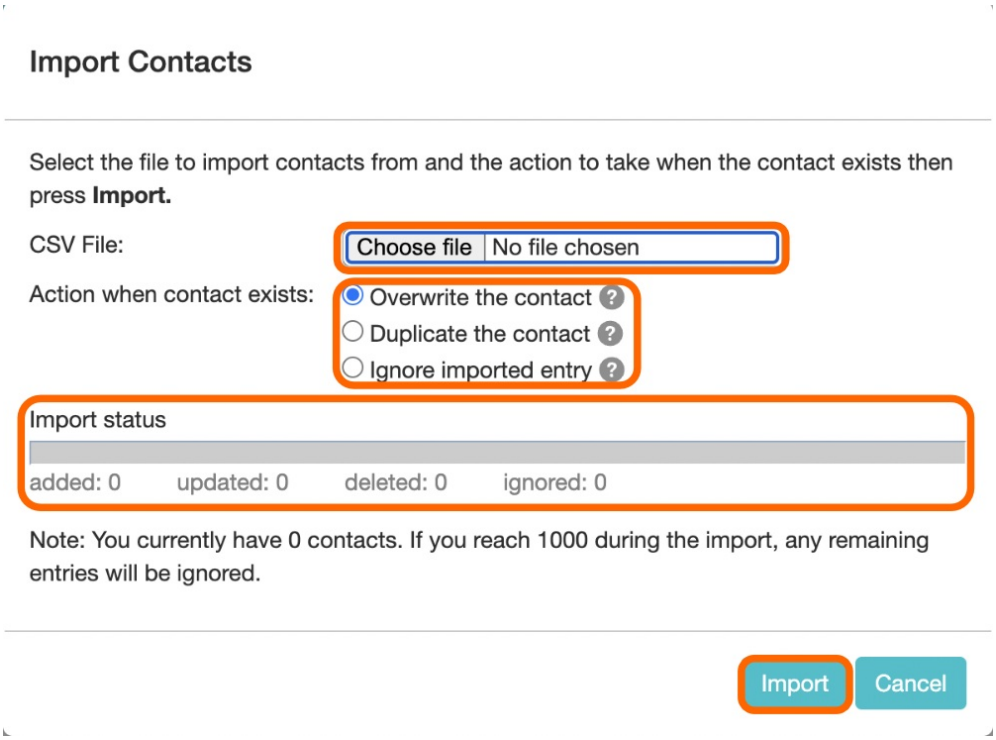


Within the Contacts page you will see the following, click on**Import**.



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.

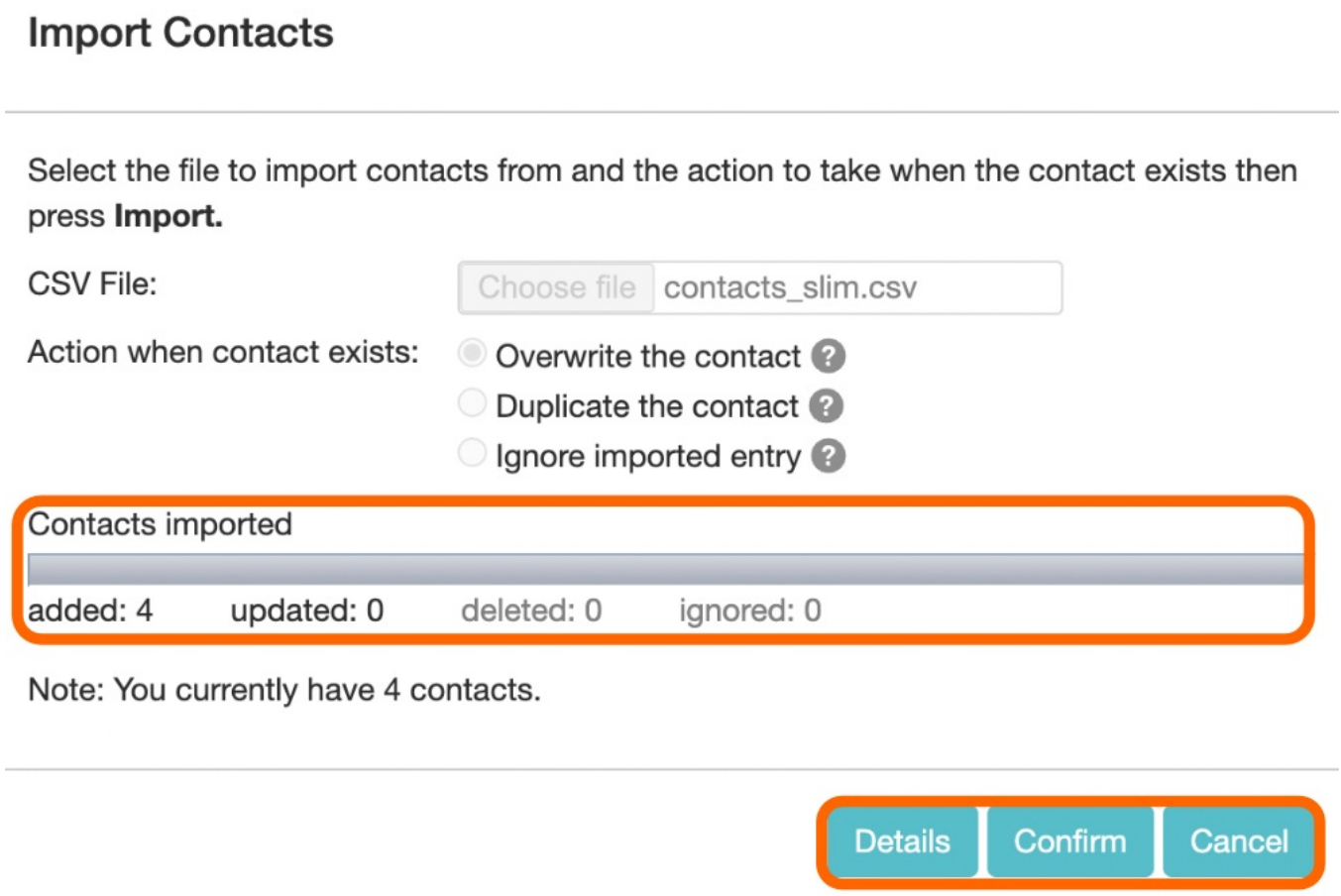


Click on **Choose file** and select the CSV file you would like to import, select the**Action when contact exists** and then click on **Import**.

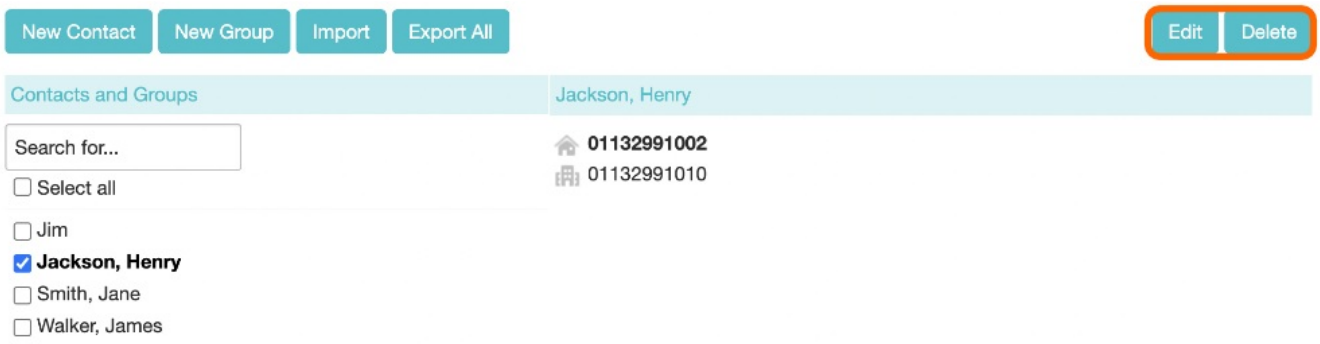
Monitor the **Import status** as this will details of the contacts imported.

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**.



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



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 os 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:

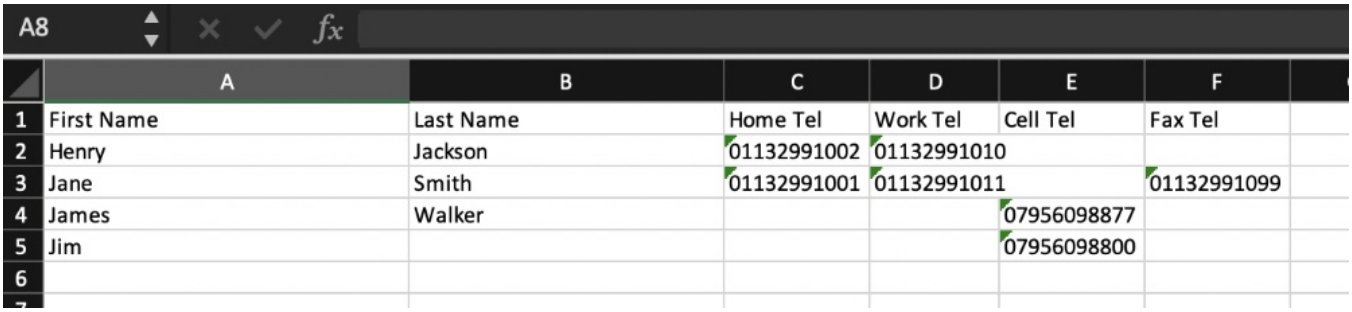
Contacts Minimal version

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:

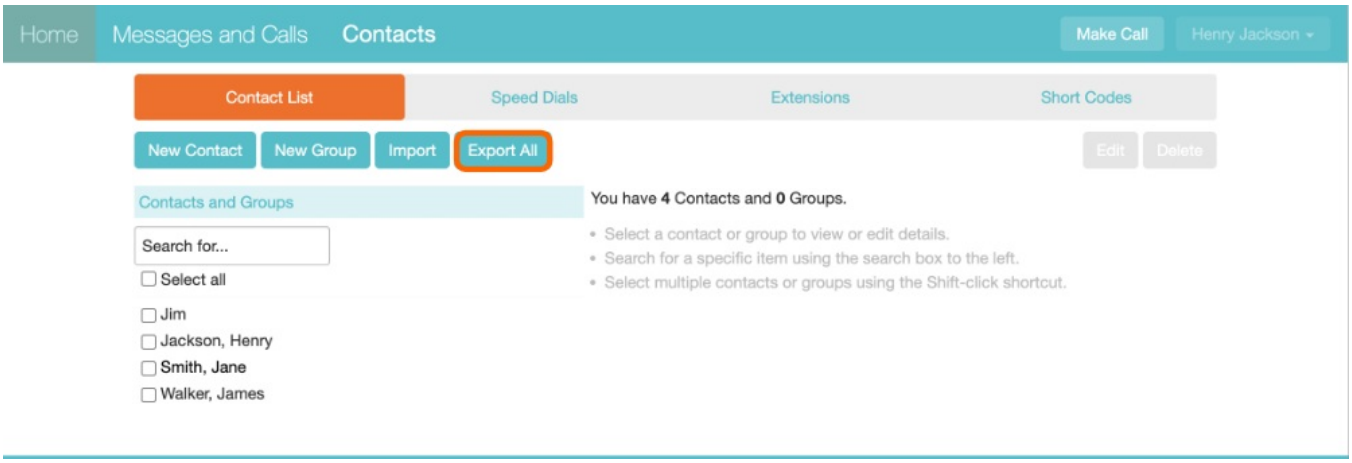


Once you have finished making the changes save the file as a CSV and follow the above instructions to import.

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

Exporting Contacts

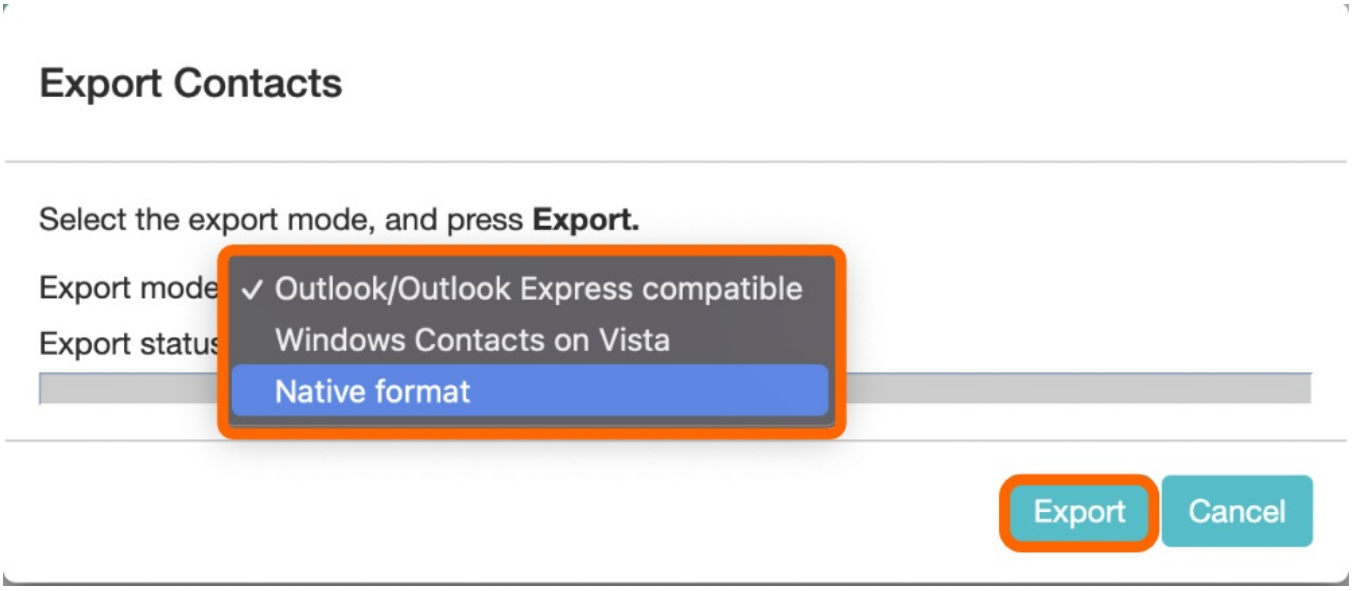
Within the **Contacts** page click on **Export All**.



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.



Revision #6
Created Tue, Feb 15, 2022 10:45 AM by Admin
Updated Mon, Jan 23, 2023 10:09 AM by Admin