

Importing and Exporting Contacts

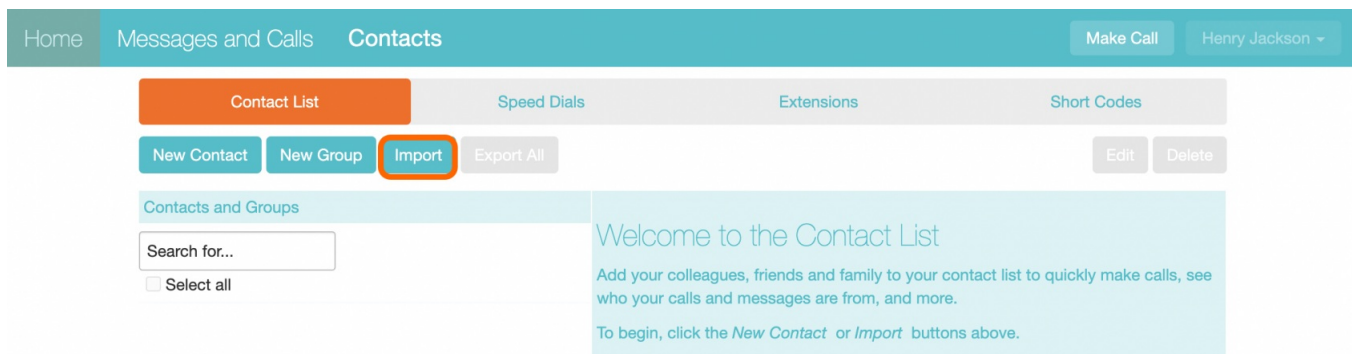
INFO: With the CommPortal contacts, these contacts will be sent to all registered devices for that subscriber. This will include the Pod Connect mobile and desktop applications

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 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: Choose file | No file chosen

Action when contact exists: ☒ Overwrite the contact ?
☐ Duplicate the contact ?
☐ Ignore imported entry ?

Import status

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

Import Cancel

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:

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 are 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
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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**.

Home

Messages and Calls

Contacts

Make Call

Henry Jackson ▾

Contact List

Speed Dials

Extensions

Short Codes

New Contact

New Group

Import

Export All

Edit

Delete

Contacts and Groups

You have 4 Contacts and 0 Groups.

Search for...

☐ Select all

☐ Jim

☐ Jackson, Henry

☐ Smith, Jane

☐ Walker, James

- Select a contact or group to view or edit details.
- Search for a specific item using the search box to the left.
- 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

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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