Zoho Corporation

Importing Data to Zoho FSM

Data from external sources can be added to Zoho FSM. You can easily populate data in the modules in bulk. External data can be imported to Zoho FSM in three simple steps:

1. Upload your data file
2. Choose your import option
3. Map fields in Zoho FSM to columns in your data file

- **Permission Required**: Import
- Find out the Edition-specific limits for Import Data.

Import Checklist

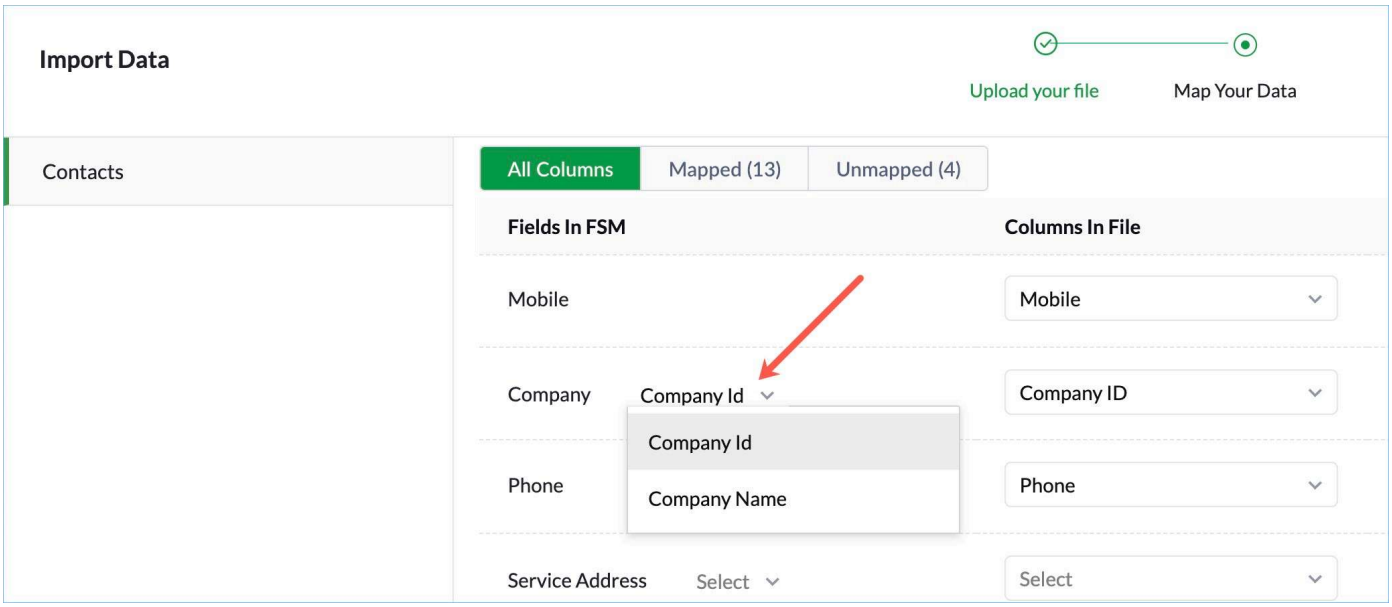
1. Only users with the **Administrator** profile can import data into FSM.
2. The data import file must be in the **CSV** (filename.csv) file format.
3. Each column in the CSV file will be mapped to the field in the module that matches its column header. Ensure that the first row in the CSV file lists the field names. Also ensure that there is atleast one data value in the columns, otherwise the column will not be listed in *Import Data - Map Your Data* screen.
4. More than 10 blank rows in the file might indicate the end of the file and the data after the blank rows will be ignored during import. Make sure not to leave blank rows in between rows of data.
5. In case multi-currency is enabled and the **Currency** field is not mapped in the CSV file, then the base currency will be added to the records. Even when the Currency field is mapped but the mapped column has empty or invalid values, the base currency will be added to the records.
6. Workflow rules triggered by Created, Edited, or Created or Edited will not apply to records that have been added or modified through data import.

Guidelines Specific to Fields

While using different field types, you need to keep in mind certain guidelines:

Lookup field

- Ensure that the records for lookup field values are already created. For example, if you are trying to import Contacts, ensure that the parent Companies that you want to associate with the Contacts are already added to Zoho FSM.
- For Lookup fields like Company Name, you need to select the identifier (Company ID, Company Name) to which you want to map the values in the corresponding columns in the CSV file.



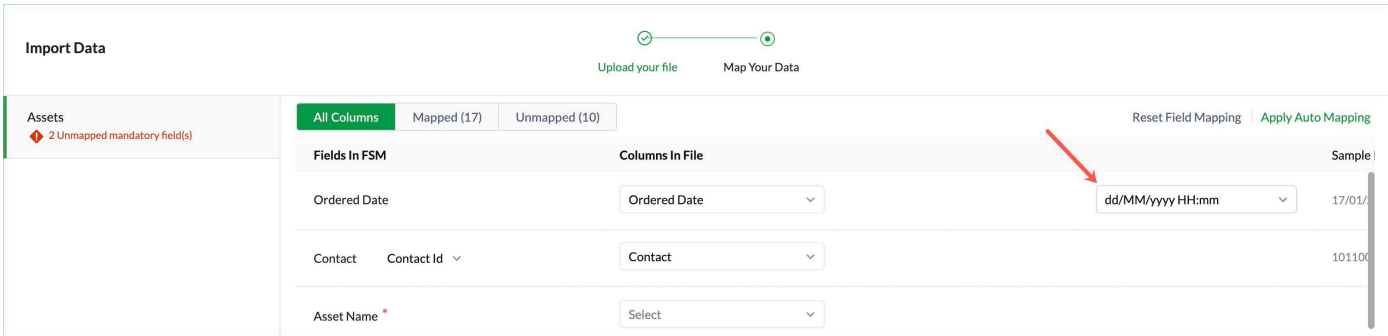
The following table contains the details of some of the lookup fields in the modules:

Module	Lookup field	Identifier to be selected for the Lookup field
Contacts	Company	Company Id Company Name
	Service Address/Billing Address	Address Id (Record ID of the address) Address Unique Id (Name of the address. E.g. AD-1)
	Contact Owner	User Id Email
Companies	Company Owner	User Id Email
	Service Address/Billing Address	Address Id (Record ID of the address) Address Unique Id (Name of the address. E.g. AD-1)
Assets	Contact	Contact Id
	Asset Owner	User Id Email

	Company	Company Id Company Name
	Product	Service and Part Id Name
	Asset	Asset Id Asset Name
Services And Parts	Work Type	Work Type Id Work Type Name
	Service and Part Owner	User Id Email

Date

For the date field, in the mapping screen (see screenshot below), select the date format you are using in the CSV file.



The following table lists the date formats supported.

Date Format	Example
yyyy-MM-dd HH:mm:ss	2007-03-06 13:44:25
yyyy-MM-dd HH:mm	2007-03-06 13:44
yyyy-MM-dd hh:mm:ss a	2007-03-06 01:44:25 PM
yyyy-MM-dd hh:mm a	2007-03-06 01:44 PM
yyyy-dd-MM HH:mm:ss	2007-06-03 13:44:25
yyyy-dd-MM HH:mm	2007-06-03 13:44
yyyy-dd-MM hh:mm:ss a	2007-06-03 01:44:25 PM
yyyy-dd-MM hh:mm a	2007-06-03 01:44 PM
dd/MM/yyyy HH:mm:ss	06/03/2007 13:44:25
dd/MM/yyyy HH:mm	06/03/2007 13:44

dd/MM/yyyy hh:mm:ss a	06/03/2007 01:44:25 PM
dd/MM/yyyy hh:mm a	06/03/2007 01:44 PM
dd-MM-yyyy HH:mm:ss	06-03-2007 13:44:25
dd-MM-yyyy HH:mm	06-03-2007 13:44
dd-MM-yyyy hh:mm:ss a	06-03-2007 01:44:25 PM
dd-MM-yyyy hh:mm a	06-03-2007 01:44 PM
MM/dd/yyyy HH:mm:ss	03/06/2007 13:44:25
MM/dd/yyyy HH:mm	03/06/2007 13:44
MM/dd/yyyy hh:mm:ss a	03/06/2007 01:44:25 PM
MM/dd/yyyy hh:mm a	03/06/2007 01:44 PM
dd.MM.yyyy HH:mm:ss	06.03.2007 13:44:25
dd.MM.yyyy HH:mm	06.03.2007 13:44
dd.MM.yyyy hh:mm:ss a	06.03.2007 01:44:25 PM
dd.MM.yyyy hh:mm a	06.03.2007 01:44 PM
MM.dd.yyyy HH:mm:ss	03.06.2007 13:44:25
MM.dd.yyyy HH:mm	03.06.2007 13:44
MM.dd.yyyy hh:mm:ss a	03.06.2007 01:44:25 PM
MM.dd.yyyy hh:mm a	03.06.2007 01:44 PM
MM-dd-yyyy HH:mm:ss	03-06-2007 13:44:25
MM-dd-yyyy HH:mm	03-06-2007 13:44
MM-dd-yyyy hh:mm:ss a	03-06-2007 01:44:25 PM
MM-dd-yyyy hh:mm a	03-06-2007 01:44 PM
yy-MM-dd HH:mm:ss	99-12-05 13:44:25
yy-MM-dd HH:mm	99-12-05 13:44
yy-MM-dd hh:mm:ss a	99-12-05 01:44:25 PM
yy-MM-dd hh:mm a	99-12-05 01:44 PM
yy-dd-MM HH:mm:ss	99-05-12 13:44:25
yy-dd-MM HH:mm	99-05-12 13:44

yy-dd-MM hh:mm:ss a	99-05-12 01:44:25 PM
yy-dd-MM hh:mm a	99-05-12 01:44 PM
dd/MM/yy HH:mm:ss	05/12/99 13:44:25
dd/MM/yy HH:mm	05/12/99 13:44
dd/MM/yy hh:mm:ss a	05/12/99 01:44:25 PM
dd/MM/yy hh:mm a	05/12/99 01:44 PM
MM/dd/yy HH:mm:ss	12/05/99 13:44:25
MM/dd/yy HH:mm	12/05/99 13:44
MM/dd/yy hh:mm:ss a	12/05/99 01:44:25 PM
MM/dd/yy hh:mm a	12/05/99 01:44 PM
dd.MM.yy HH:mm:ss	05.12.99 13:44:25
dd.MM.yy HH:mm	05.12.99 13:44
dd.MM.yy hh:mm:ss a	05.12.99 01:44:25 PM
dd.MM.yy hh:mm a	05.12.99 01:44 PM
MM.dd.yy HH:mm:ss	12.05.99 13:44:25
MM.dd.yy HH:mm	12.05.99 13:44
MM.dd.yy hh:mm:ss a	12.05.99 01:44:25 PM
MM.dd.yy hh:mm a	12.05.99 01:44 PM

Email

In the CSV file, a valid email address in the format prefix@domain.com should be used.

Taxable

In the CSV file, the valid values to be used for the Taxable field are True/1 or False/0.

Tax Percentage

In the CSV file, only numbers or decimal should be used. The percentage sign should not be included.

Mandatory fields

You can only import data to certain modules/entities. The tables below list the mandatory fields required in the data import file. The mandatory fields differ for each region-specific Zoho FSM edition.

US Edition

Entity	Mandatory Field
Contacts	Last Name, Taxable, Tax Name, Tax Authority, Tax Percentage, Tax Exemption Code
Companies	Company Name, Taxable, Tax Name, Tax Authority, Tax Percentage, Tax Exemption Code
Services and Parts	Name, Unit Price, Taxable, Tax Exemption Code
Assets	Asset Name, Product, Contact/Company*
Notes	ID of the Parent module
Addresses	ID of the Parent module, Taxable, Tax Name, Tax Authority, Tax Percentage, Tax Exemption Code, Address Name, Street 1, City

*Depends on the sync type of the FSM-Invoice/Books integration

Australia Edition

Entity	Mandatory Field
Contacts	Last Name, Taxable, Tax Name, Tax Percentage, Tax Exemption Code
Companies	Company Name, Taxable, Tax Name, Tax Percentage, Tax Exemption Code
Services and Parts	Name, Unit Price, Taxable, Tax Exemption Code
Assets	Asset Name, Product, Contact/Company*
Notes	ID of the Parent module
Addresses	ID of the Parent module, Tax Exemption Code, Address Name, Street 1, City

*Depends on the sync type of the FSM-Invoice/Books integration

Canada Edition

Entity	Mandatory Field
Contacts	Last Name, Taxable, Tax Name, Tax Agency, Tax Percentage, Tax Exemption Code

Companies	Company Name, Taxable, Tax Name, Tax Agency, Tax Percentage, Tax Exemption Code
Services and Parts	Name, Unit Price, Taxable, Tax Exemption Code
Assets	Asset Name, Product, Contact/Company*
Notes	ID of the Parent module
Addresses	ID of the Parent module, Tax Exemption Code, Address Name, Street 1, City

*Depends on the sync type of the FSM-Invoice/Books integration

India Edition

Entity	Mandatory Field
Contacts	Last Name, Taxable, GST Treatment, Place of Supply, Tax Exemption Code
Companies	Company Name, Taxable, GST Treatment, Place of Supply, Tax Exemption Code
Services and Parts	Name, Unit Price, Taxable, Intra State Tax Rate, Inter State Tax Rate, Tax Exemption Code
Assets	Asset Name, Product, Contact/Company*
Notes	ID of the Parent module
Addresses	ID of the Parent module, Tax Exemption Code, Address Name, Street 1, City

*Depends on the sync type of the FSM-Invoice/Books integration

UK Edition

Entity	Mandatory Field
Contacts	Last Name
Companies	Company Name
Services and Parts	Name, Unit Price, Tax Name
Assets	Asset Name, Product, Contact/Company*
Notes	ID of the Parent module
Addresses	ID of the Parent module, Address Name, Street 1, City

*Depends on the sync type of the FSM-Invoice/Books integration

Kuwait Edition

Entity	Mandatory Field

Contacts	Last Name
Companies	Company Name
Services and Parts	Name, Unit Price
Assets	Asset Name, Product, Contact/Company*
Notes	ID of the Parent module
Addresses	ID of the Parent module, Address Name, Street 1, City

*Depends on the sync type of the FSM-Invoice/Books integration

Qatar Edition

Entity	Mandatory Field
Contacts	Last Name
Companies	Company Name
Services and Parts	Name, Unit Price
Assets	Asset Name, Product, Contact/Company*
Notes	ID of the Parent module
Addresses	ID of the Parent module, Address Name, Street 1, City

*Depends on the sync type of the FSM-Invoice/Books integration

Saudi Arabia Edition

Entity	Mandatory Field
Contacts	Last Name, Tax Treatment, Place of Supply, Tax Registration Number†
Companies	Company Name, Tax Treatment, Place of Supply, Tax Registration Number†
Services and Parts	Name, Unit Price, Tax Name, Tax Percentage
Assets	Asset Name, Product, Contact/Company*
Notes	ID of the Parent module
Addresses	ID of the Parent module, Address Name, Street 1, City

*Depends on the sync type of the FSM-Invoice/Books integration

† Depends on the value of Tax Treatment

United Arab Emirates Edition

Entity	Mandatory Field

Contacts	Last Name, Tax Treatment, Place of Supply, Tax Registration Number†
Companies	Company Name, Tax Treatment, Place of Supply, Tax Registration Number†
Services and Parts	Name, Unit Price, Tax Name, Tax Percentage
Assets	Asset Name, Product, Contact/Company*
Notes	ID of the Parent module
Addresses	ID of the Parent module, Address Name, Street 1, City

*Depends on the sync type of the FSM-Invoice/Books integration
† Depends on the value of Tax Treatment

Global Edition

Entity	Mandatory Field
Contacts	Last Name
Companies	Company Name
Services and Parts	Name, Unit Price
Assets	Asset Name, Product, Contact/Company*
Notes	ID of the Parent module
Addresses	ID of the Parent module, Address Name, Street 1, City

*Depends on the sync type of the FSM-Invoice/Books integration

Import Limits

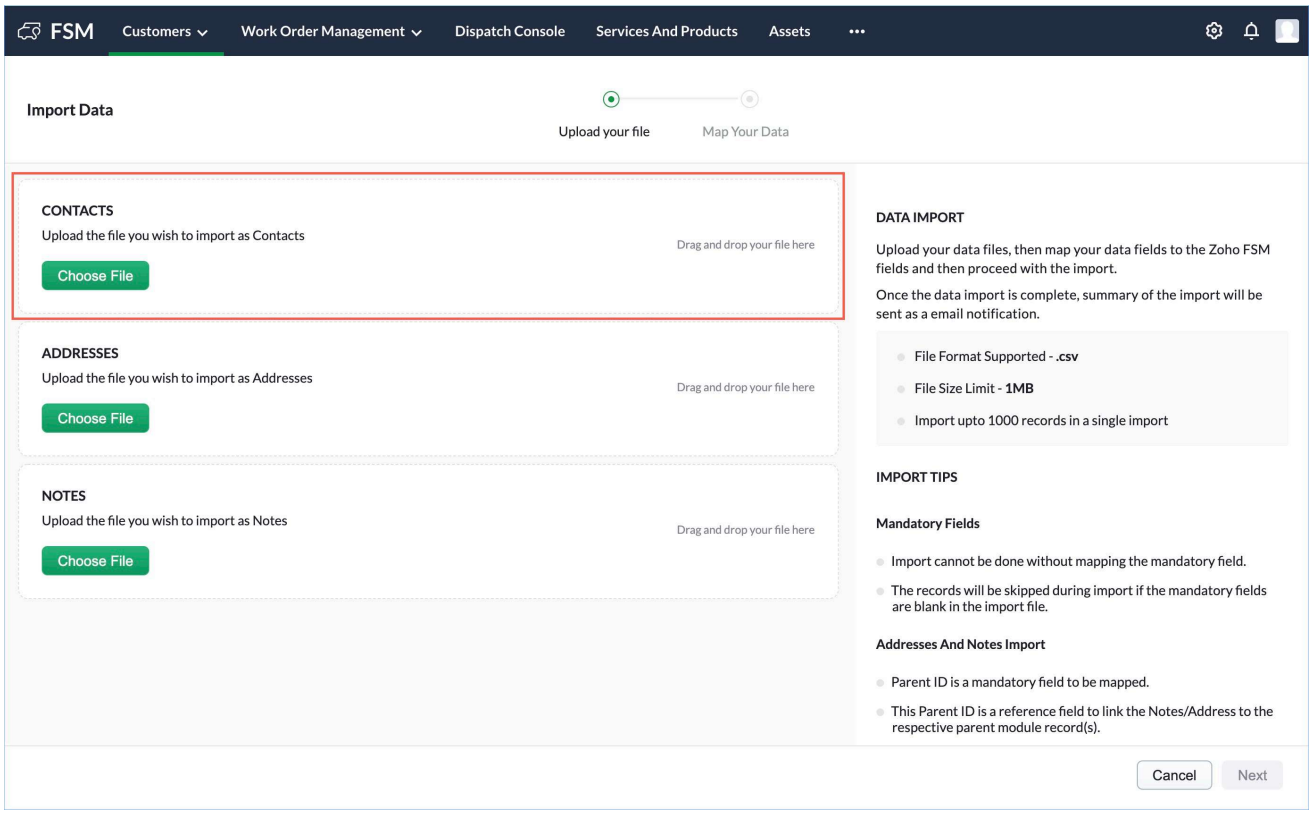
1. The maximum allowable size limit of the data import file (CSV file) is:
   Free: 1 MB
   Standard: 5MB
   Professional: 5MB
2. A maximum number of records that can be imported using a single import file are:
   Free: 1000
   Standard: 10000
   Professional: 20000
3. At the organization level, only one data import can be done at a time, even across modules.

Import Data to a Module

Follow the steps below to import data to a module:

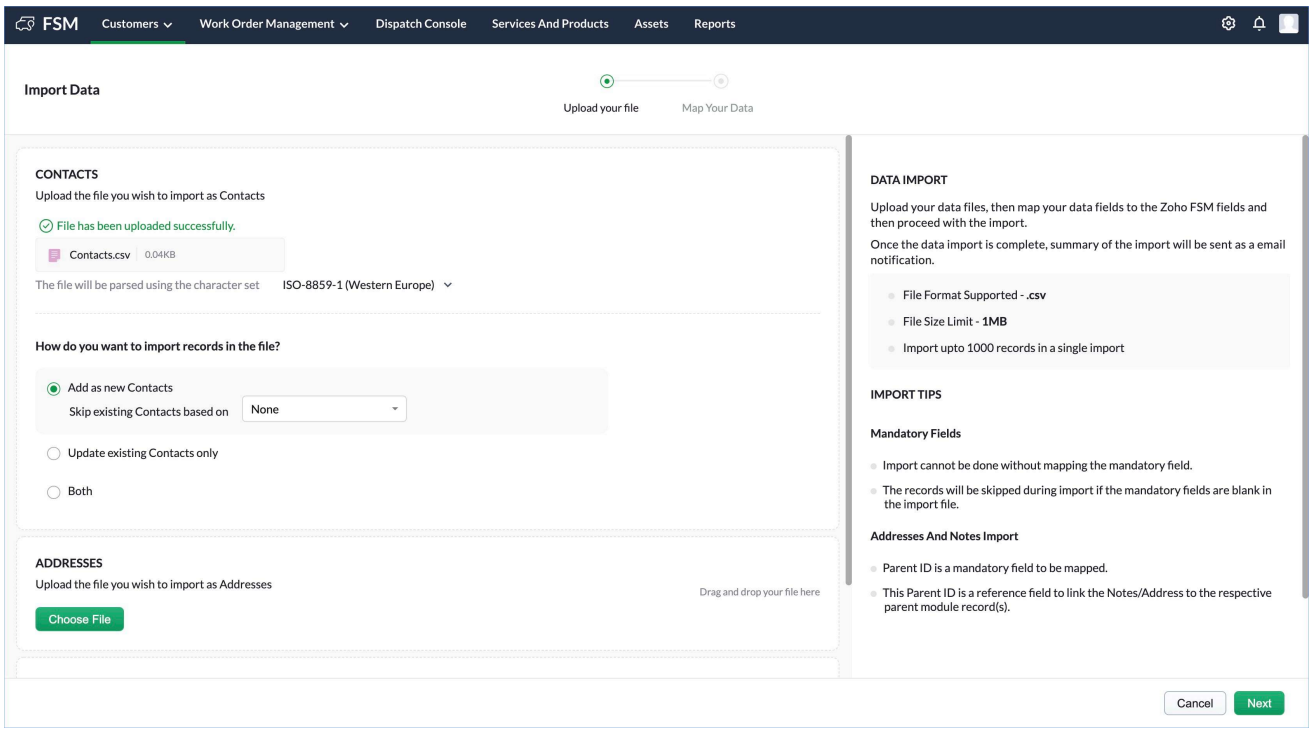
1. Select the module to which you want to import data.
2. Click **Import Data**.

3. Click **Choose File** to upload your CSV file or drag and drop it.

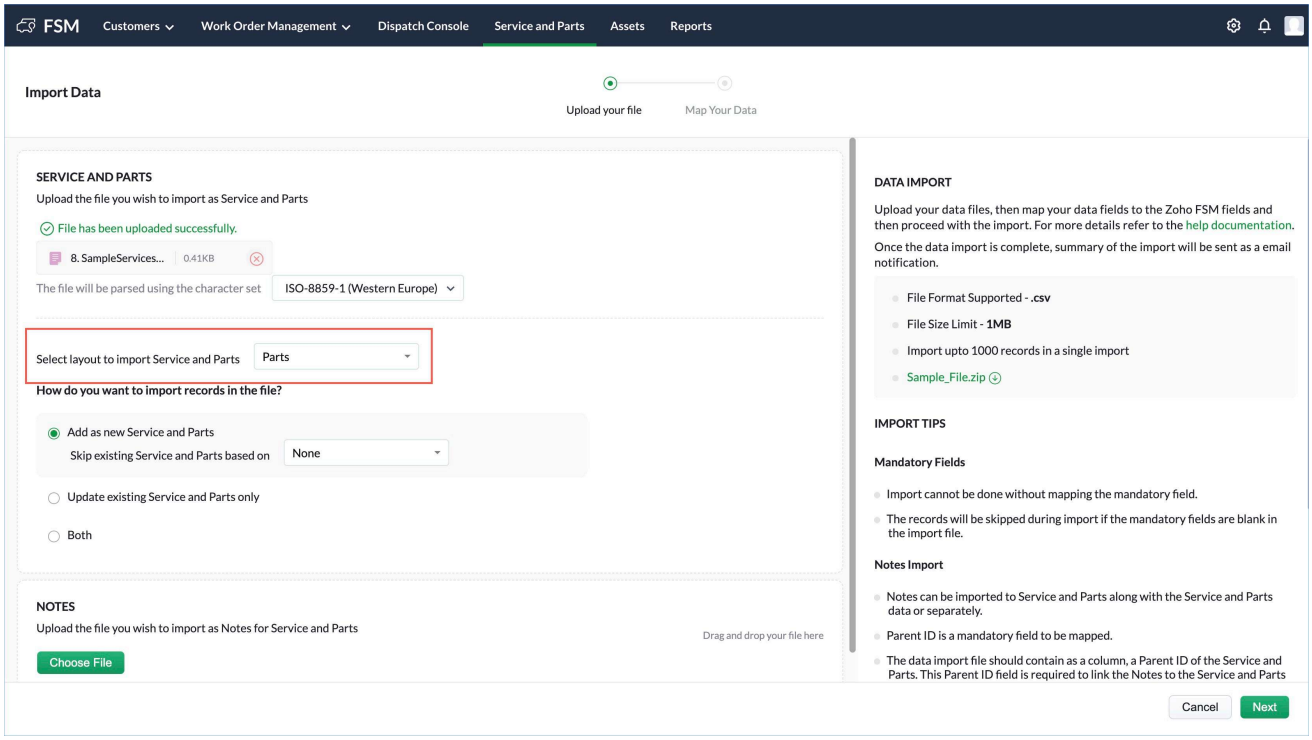


4. Click **Next** to proceed.
   - You can choose the character set with which to parse your CSV file.
   - You can choose the way in which the imported data gets added in the module:
     a. **Add as new [Records]**: The entries in your CSV file will be added as new records in FSM. Use **Skip existing [Records] based on** to skip entries in your CSV file that have already been added to FSM.
     b. **Update existing [Records] only**: The entries in your CSV file will be used to update the existing records in FSM using the field chosen in **Find existing [Records] based on**. Use **Don't update empty values for existing [Records]** to avoid overwriting values in the existing FSM records with empty values in your CSV file entries.

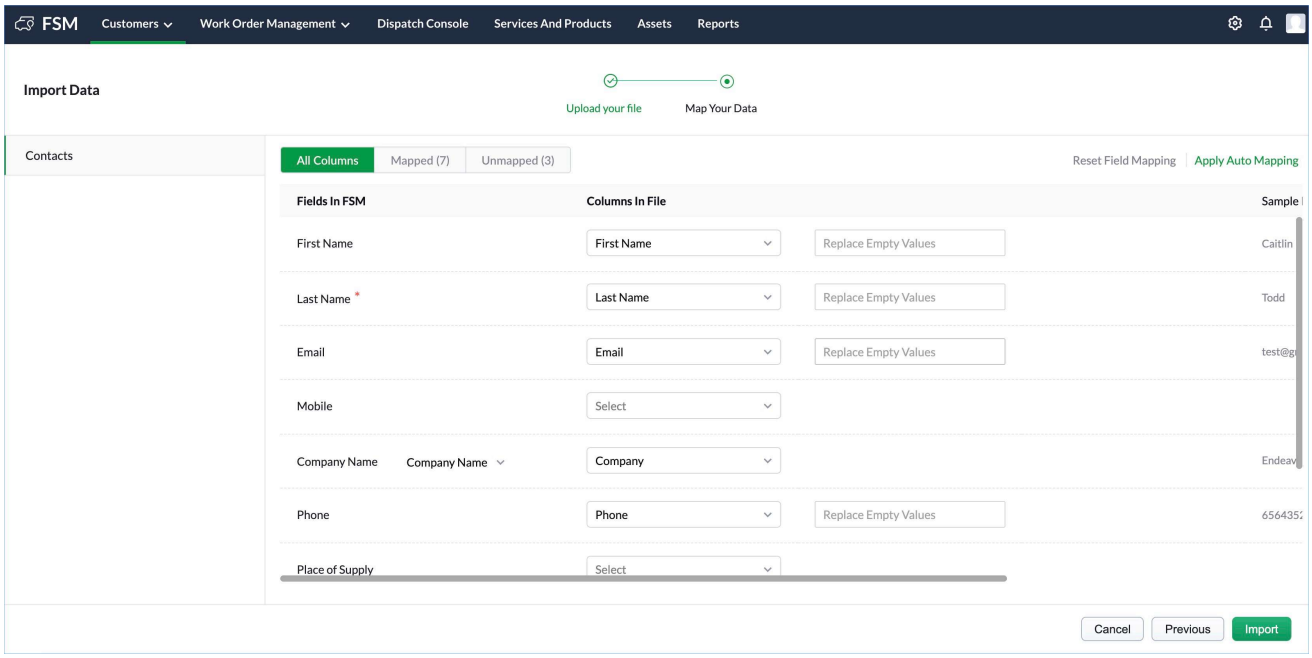
c. **Both**: You can import new [Records] as well as update existing [Records] in FSM. The existing records will be updated using the field chosen in **Find existing [Records] based on**. Use **Don't update empty values for existing [Records]** to avoid overwriting values in the existing FSM records with empty values in your CSV file entries.



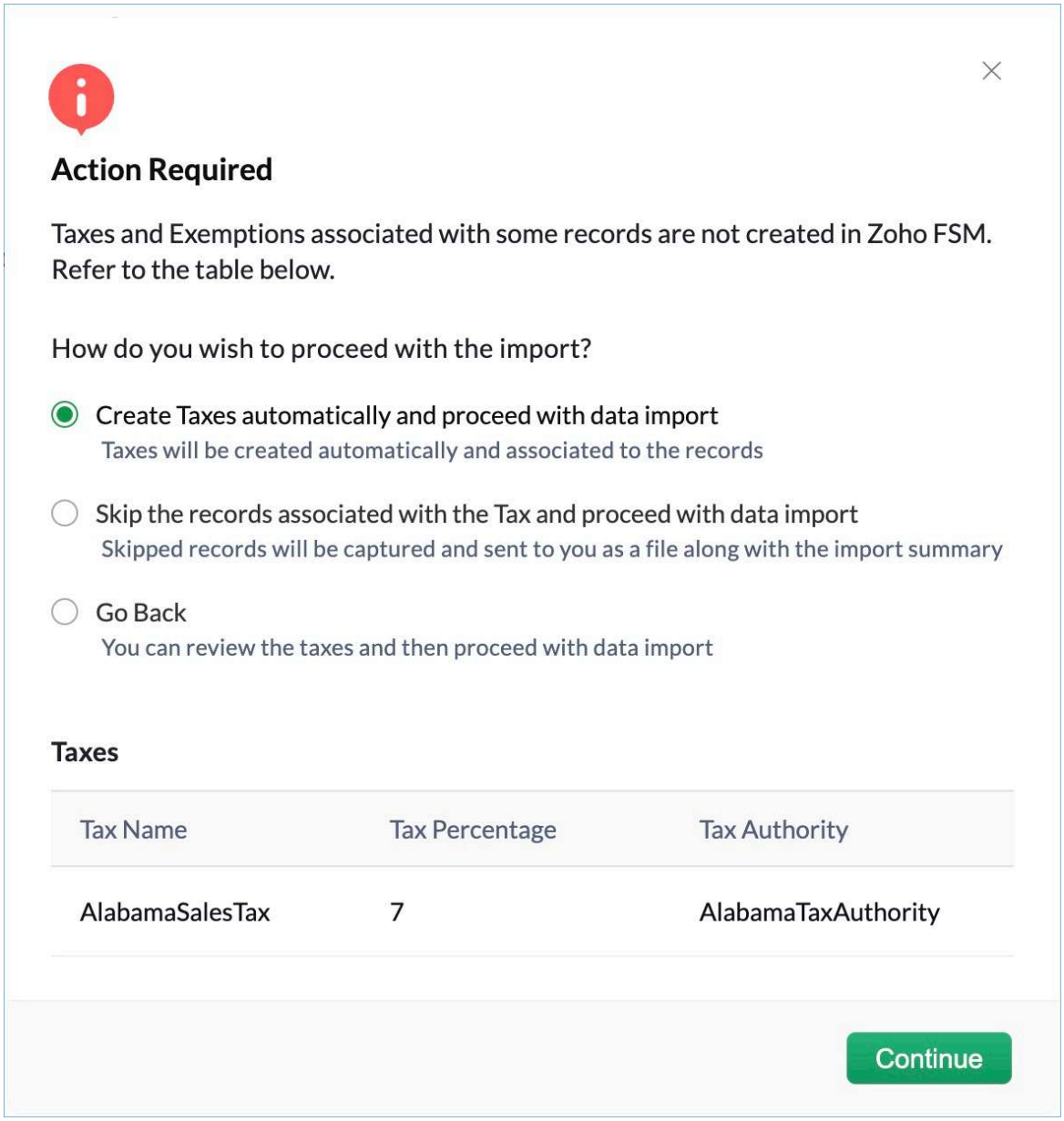
While importing Service/Part, you need to select the required entity from the **Select layout to import Service and Parts** dropdown.



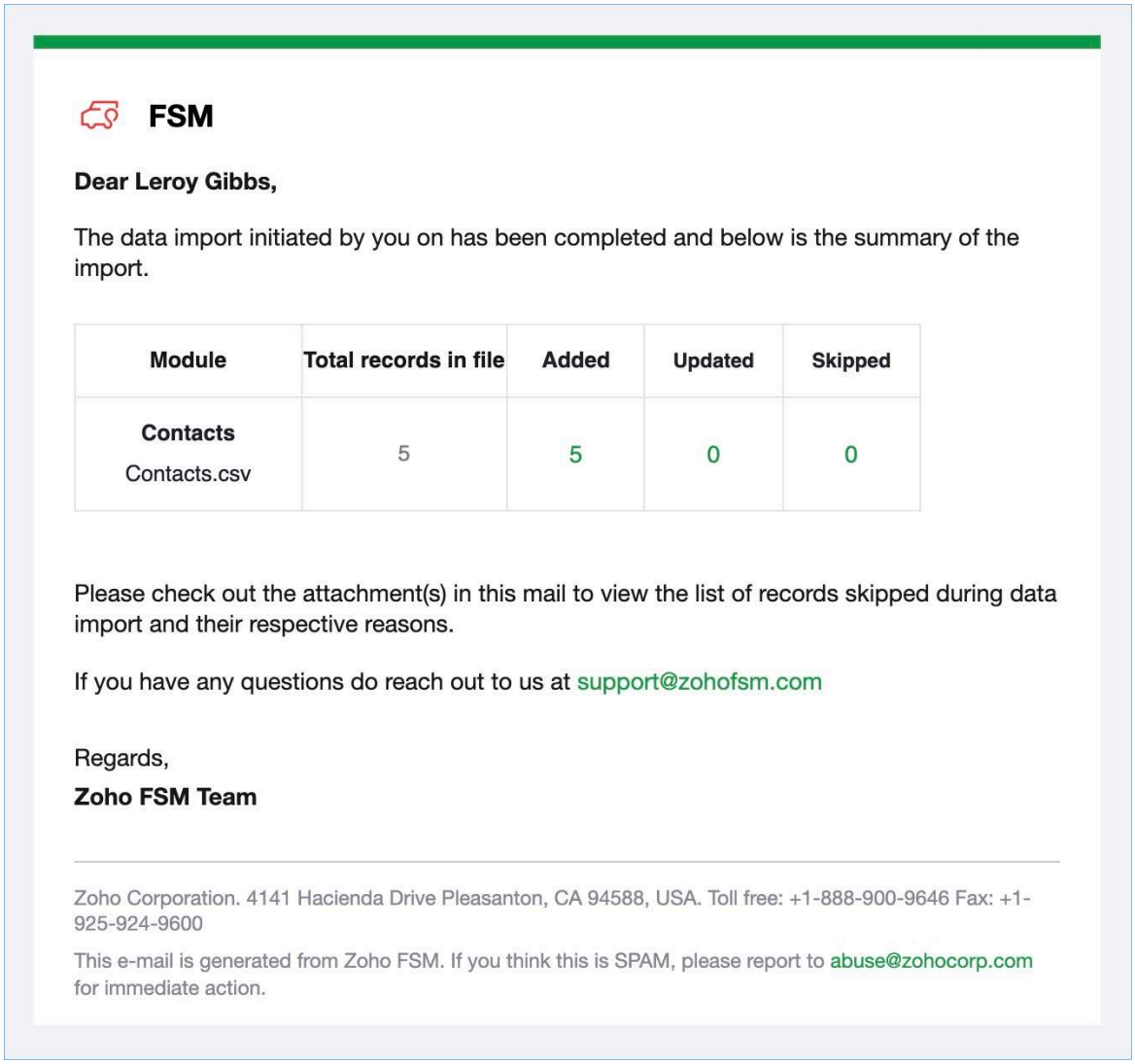
5. From the **Fields in FSM** dropdown, select the [Module] fields to map the corresponding value to under **Columns in File**. Click **Import** to proceed.
   - By default, **Auto Mapping** of fields will be applied. This will automatically map the columns in the CSV file to the corresponding fields in the module. Each column in the CSV file will be mapped to the field in the module that matches its column header. Use **Reset Field Mapping** to remove the field mappings.
   - Use **Replace Empty Values** to add any specific value to the fields whose value have been left empty in the CSV file.
   - For Lookup fields like Company Name, you also need to select the identifier (Company ID, Company Name) to which you want to map the values in the corresponding columns in the CSV file. Ensure that the records for lookup field values are already created.
   - Ensure that there is atleast one data value in the columns in the import file, else the column will not be listed under **Columns In File**.



6. Click **Yes, Initiate Import** to proceed.
   If you are adding new tax information, then the following popup will be displayed. Choose the desired option and click **Continue**.



An in-app message and email notification will inform you of the import completion. Refer to the attachment in the email to see details of the errors that occurred during import.



FSM

Dear Leroy Gibbs,

The data import initiated by you on has been completed and below is the summary of the import.

Module	Total records in file	Added	Updated	Skipped
Contacts Contacts.csv	5	5	0	0

Please check out the attachment(s) in this mail to view the list of records skipped during data import and their respective reasons.

If you have any questions do reach out to us at support@zohofsm.com

Regards,
Zoho FSM Team

Zoho Corporation. 4141 Hacienda Drive Pleasanton, CA 94588, USA. Toll free: +1-888-900-9646 Fax: +1-925-924-9600

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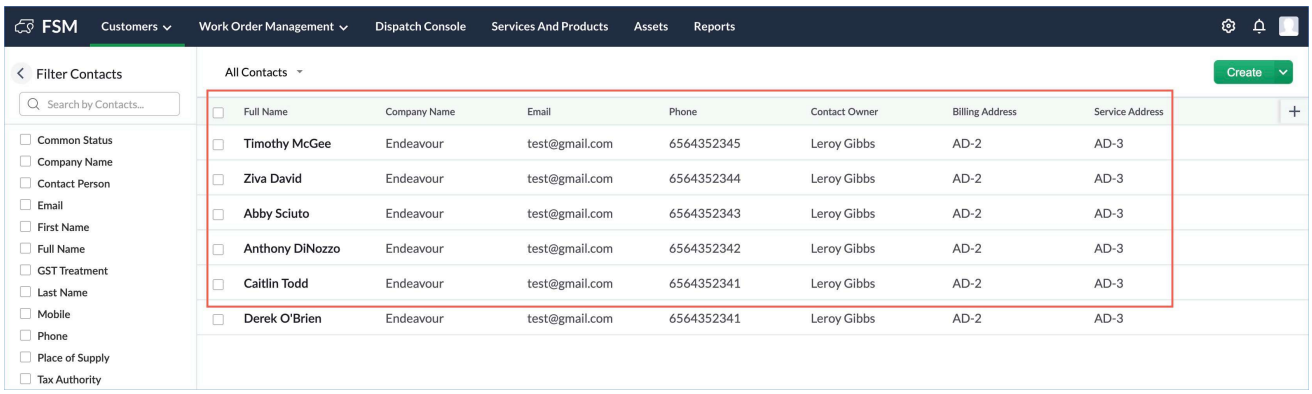
The changes from the import can be viewed in the respective module.



Import Related Data to a Module

Information related to a record such as Notes or Addresses can also be imported.

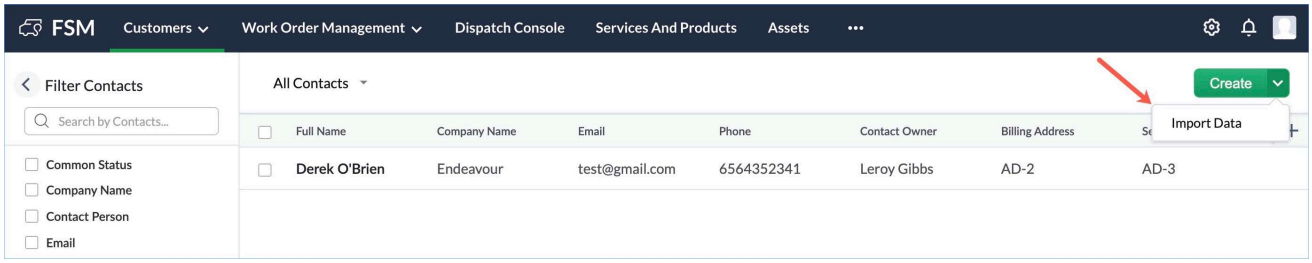
- Notes can be imported to the modules - **Contacts**, **Companies**, **Services and Parts**, and **Assets**.
- Addresses can be imported to the modules - **Contacts**, and **Companies**.
- Notes/Addresses can be imported to a parent module (Contacts, Companies, etc) along with the parent module data or separately.
- The data import file should contain as a column a unique ID of the parent module. This unique ID field is required to link the Notes/Addresses to the parent module records. For example, if you are trying to import Notes to Contacts, then the data import file should have the IDs of the Contacts to which you want to add the Notes.

Contact ID	First Name	Last Name	Contact Owner	Email	Phone	Mobile	Company ID	Company Name	Taxable	Tax	Tax Percentage	Tax Authority	Tax Exemption Code	Currency
17012200001	Andrew	Wilson (Sample)	adam@zohofsm.com	andrew.wilon@zohofsm.com	987-654-3210	987-654-3210	170122030001	Nebula	TRUE	Sales tax	7	State Tax Authority	FALSE	USD
17012200002	Harriet	Rodriguez (Sample)	adam@zohofsm.com	harriet.rodriguez_23@zohofsm.com	987-654-3210	987-654-3210	170122030002	Nebula	1	Sales tax	7	State Tax Authority	FALSE	USD

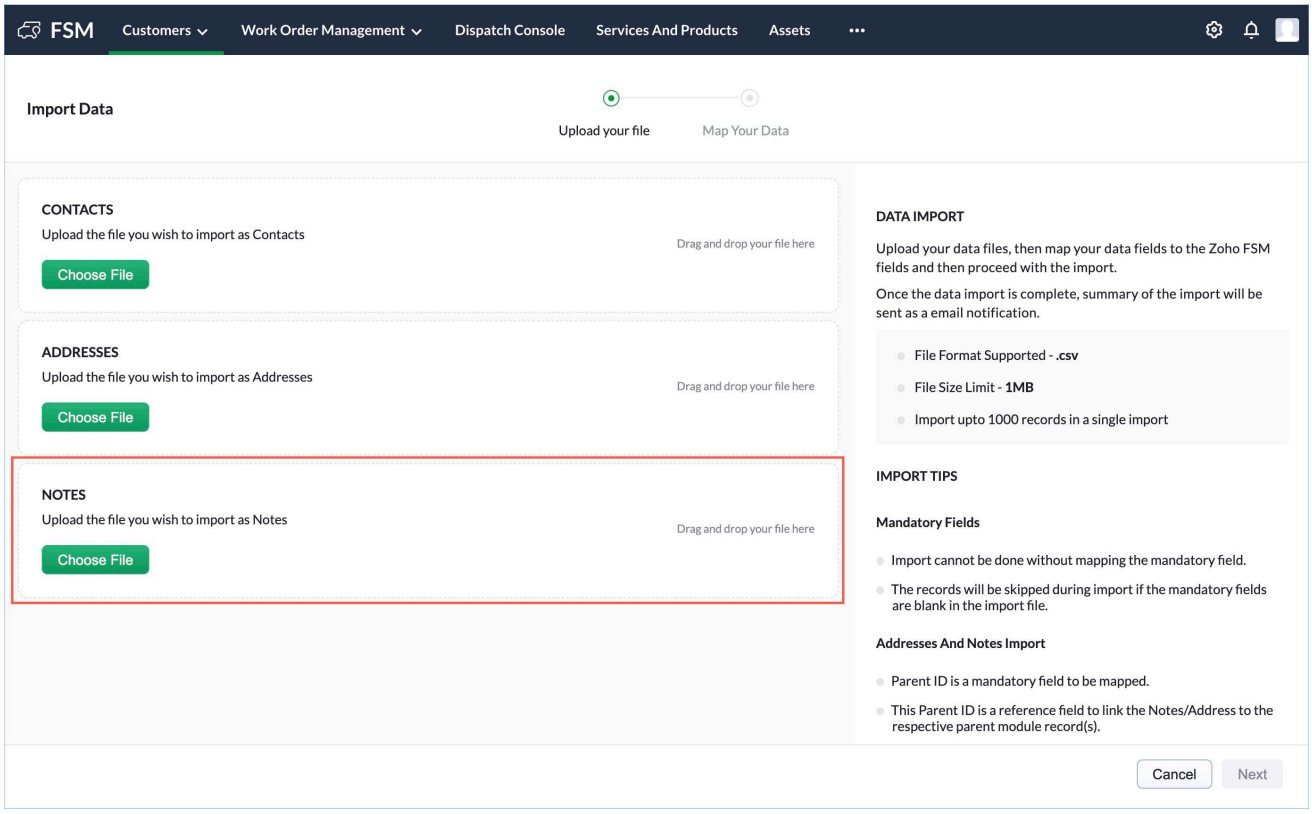
Note Title	Note Content	Parent ID
Customer Preference	Customer mostly prefers the service to be scheduled in weekends. Preferred Technician - James	17012200001
Product Details	Following inspections to be done in the product before strating a service/repair. - Identity the product to be serviced - Scan QR code - Check product details in app - Proceed with service or repair	17012200002

To import Notes/Addresses:

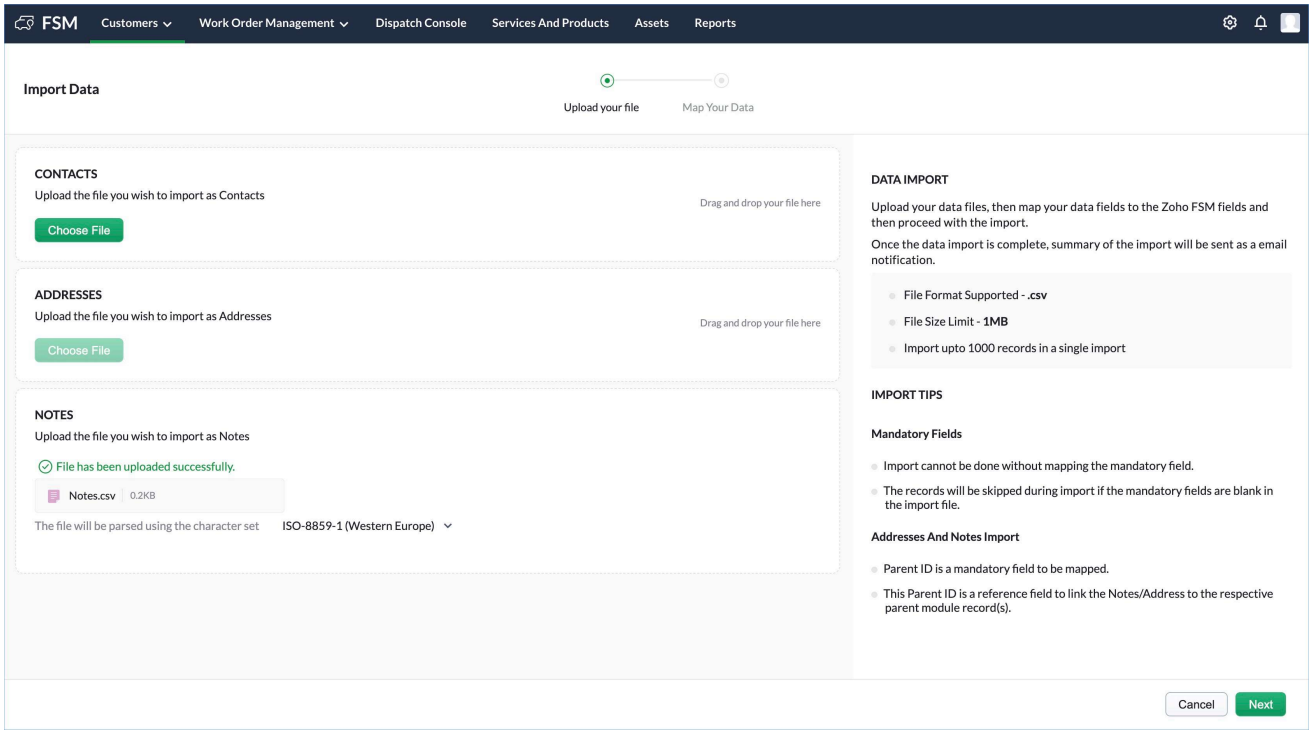
1. Navigate to the module whose records you want to add the Notes/Addresses to and click **Import Data**.



2. Under **Notes/Addresses**, either click **Choose File** to upload your CSV file or drag and drop it.

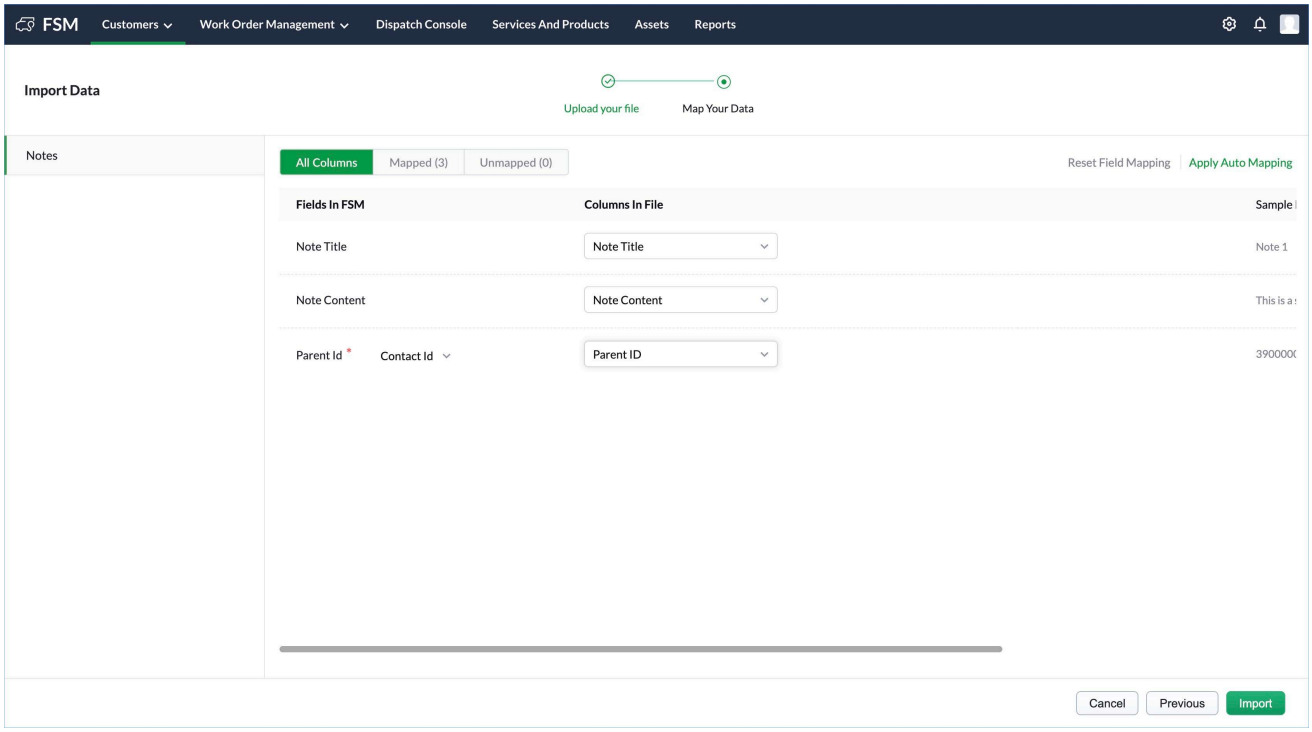


3. Click **Next** to proceed.
   You can choose the character set with which to parse your CSV file.



4. From the **Fields in FSM** dropdown, select the Notes/Addresses fields to map the corresponding value to under **Columns in File**. Click **Import** to proceed.
   - By default, **Auto Mapping** of fields will be applied. This will automatically map the

columns in the CSV file to the corresponding fields in Notes/Addresses. Each column in the CSV file will be mapped to the field in Notes/Addresses that matches its column header. Use **Reset Field Mapping** to remove the field mappings.
- Use **Replace Empty Values** to add any specific value to the Notes/Addresses fields whose value have been left empty in the CSV file.
- For the **Parent ID**, you need to select the identifier (Contact ID, Contact Name) to which you want to map the values in the corresponding column in the CSV file.



5. Click **Yes, Initiate Import** to proceed.
   An in-app message and email notification will inform you of the import completion. Refer to the attachment in the email to see details of the errors that occurred during import.

FSM

Dear Leroy Gibbs,

The data import initiated by you on has been completed and below is the summary of the import.

Module	Total records in file	Added	Updated	Skipped
Addresses Notes.csv	5	5	0	0

Please check out the attachment(s) in this mail to view the list of records skipped during data import and their respective reasons.

If you have any questions do reach out to us at support@zohofsm.com

Regards,
Zoho FSM Team

Zoho Corporation. 4141 Hacienda Drive Pleasanton, CA 94588, USA. Toll free: +1-888-900-9646 Fax: +1-925-924-9600

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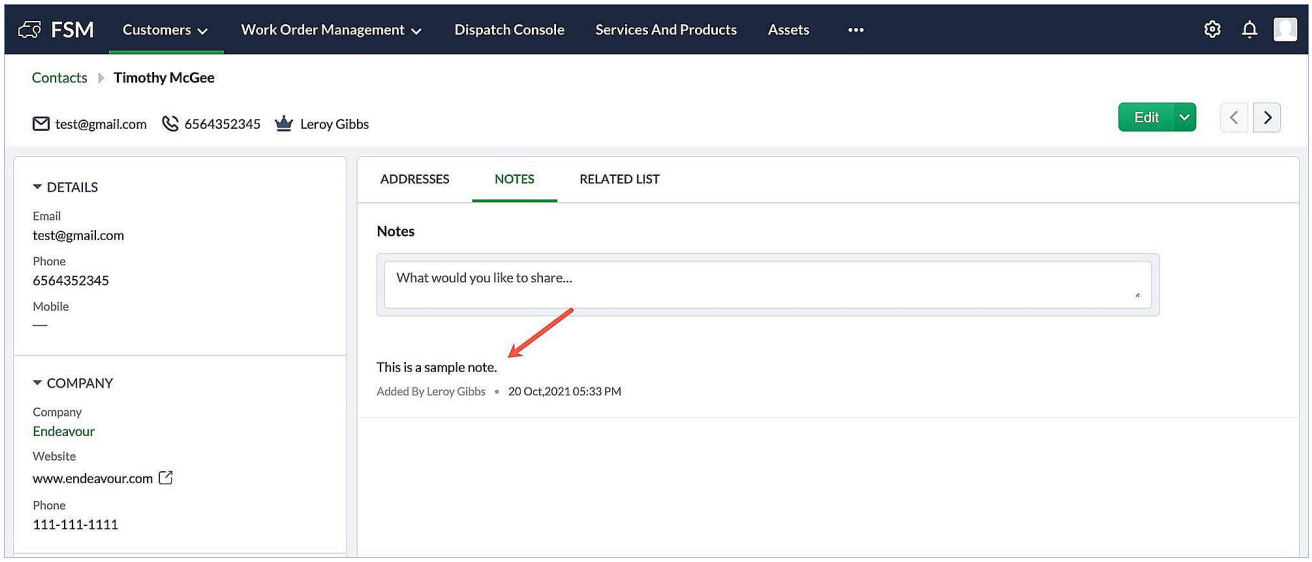
You can view the notes and addresses added in the individual records.



Import Addresses and designate as Service or Billing

You can designate the imported addresses as either the service or billing address. This can be done in two different ways:

- Using the **Address ID**
- Using the **Address Name**

This can be done while adding new records through import or updating existing records through import.

> **Note**: Please be aware that the record IDs used in the CSV files are temporary placeholders, and new IDs will be automatically generated once the records are created in Zoho FSM.

I. Address import while adding new records

Using the Address ID

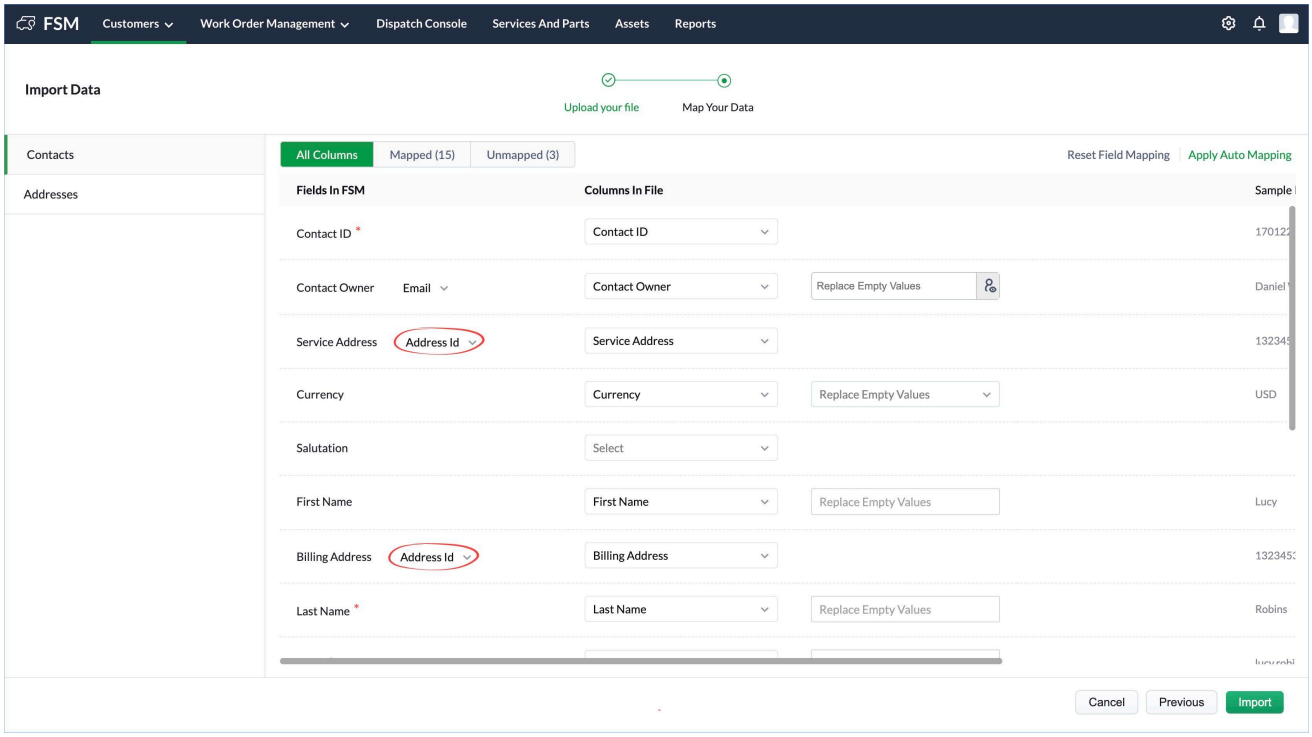
Ensure that the IDs of the addresses from the Address CSV file that you want to designate as the Service and Billing address are mapped to the **Service Address** and **Billing Address** columns respectively of the Parent CSV file.

Contact ID	First Name	Last Name	Contact Owner	Email	Phone	Mobile	Company ID	Company Name	Service Address	Billing Address	Taxable	Tax	Tax Percentage	Tax Authority	Tax Exemption Code	Currency
17012200001	Lucy	Robins	Daniel Warne	lucy.robins@zylker.com	111-111-1111	987-654-3210	1011000000195085	Zylker Inc	13234535	13234536	TRUE	Sales tax	7	State Tax Authority	FALSE	USD

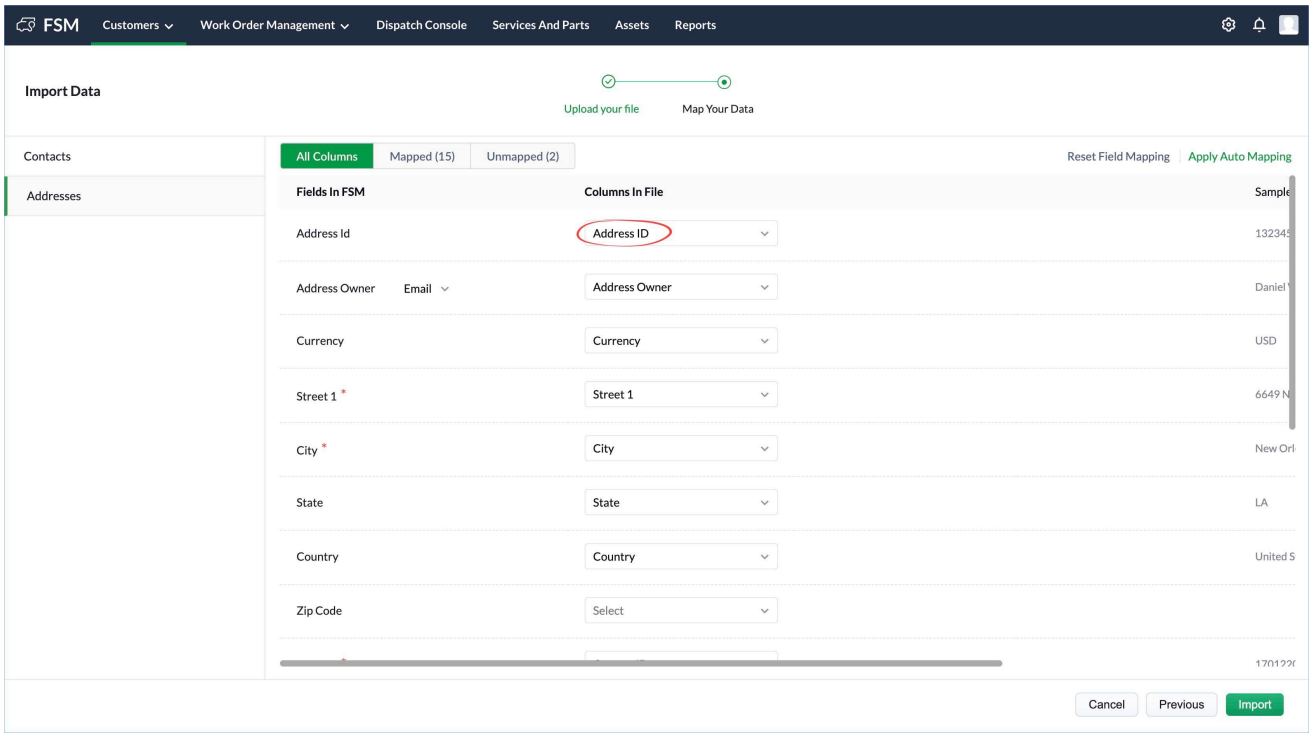
Address ID	Contact ID	Company	Address Owner	Address Name	Street 1	Street 2	City	State	Zip code	Country	Territory	Taxable	Tax	Tax Percentage	Tax Authority	Tax Exemption Code	Currency
13234535	17012200001	1011000000195085	Daniel Warne	Service Address	6649 N Blue Gum St		New Orleans	LA	70116	United States of America	Los Angeles	TRUE	Sales tax	7	State Tax Authority	FALSE	USD
13234536	17012200001	1011000000195085	Daniel Warne	Billing Address	7742 LA-23		Belle Chasse	LA	70037	United States of America	Los Angeles	TRUE	Sales tax	7	State Tax Authority	FALSE	USD

While importing, follow these steps:

1. For the **Service Address** and **Billing Address** fields, the **Address Id** is selected as the identifier.



2. The **Address ID** field from the Address CSV file is mapped to the **Address Id** field of FSM.



<u>Using the Address Name</u>

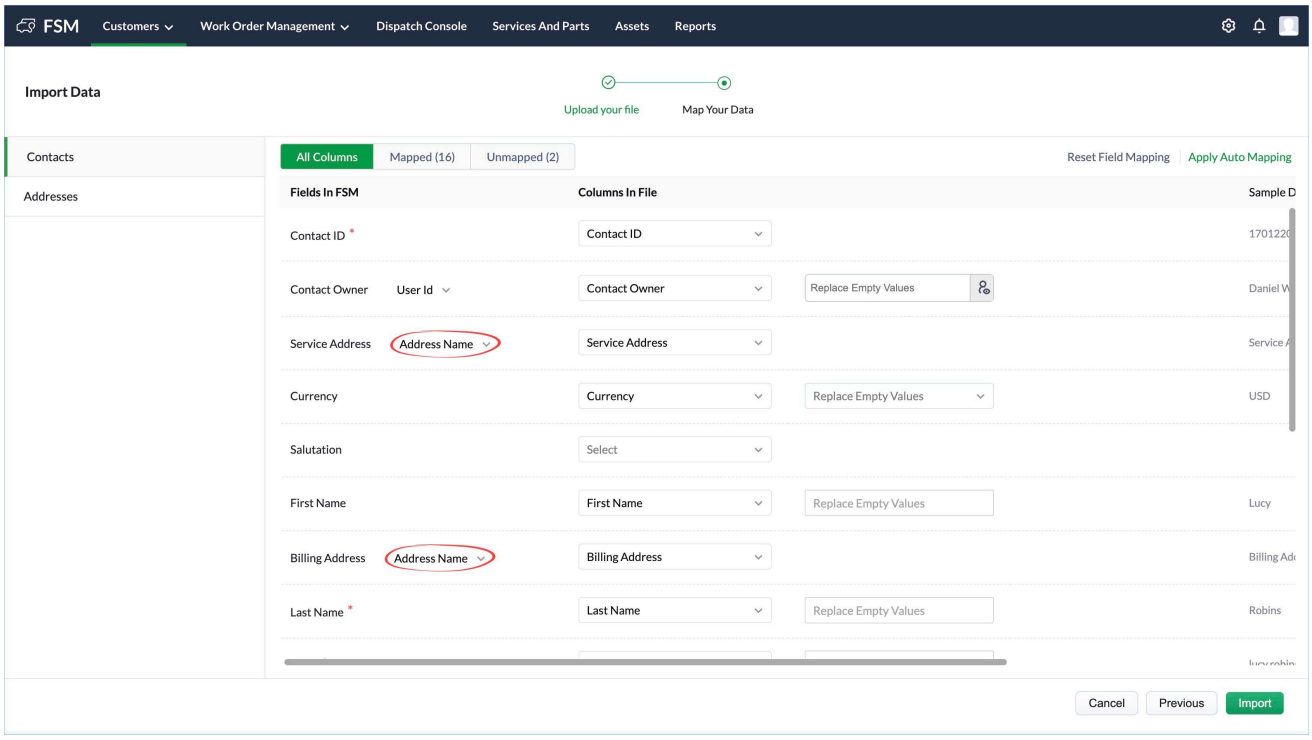
Ensure that the Address Names of the addresses from the Address CSV file that you want to designate as the Service and Billing address are mapped to the **Service Address** and **Billing Address** columns respectively of the Parent CSV file.

Contact ID	First Name	Last Name	Contact Owner	Email	Phone	Mobile	Company ID	Company Name	Service Address	Billing Address	Taxable	Tax	Tax Percentage	Tax Authority	Tax Exemption Code	Currency
17012200001	Lucy	Robins	Daniel Warne	lucy.robins@zylker.com	111-111-1111	987-654-3210	1011000000195085	Zylker Inc	Service Address	Billing Address	TRUE	Sales tax	7	State Tax Authority	FALSE	USD

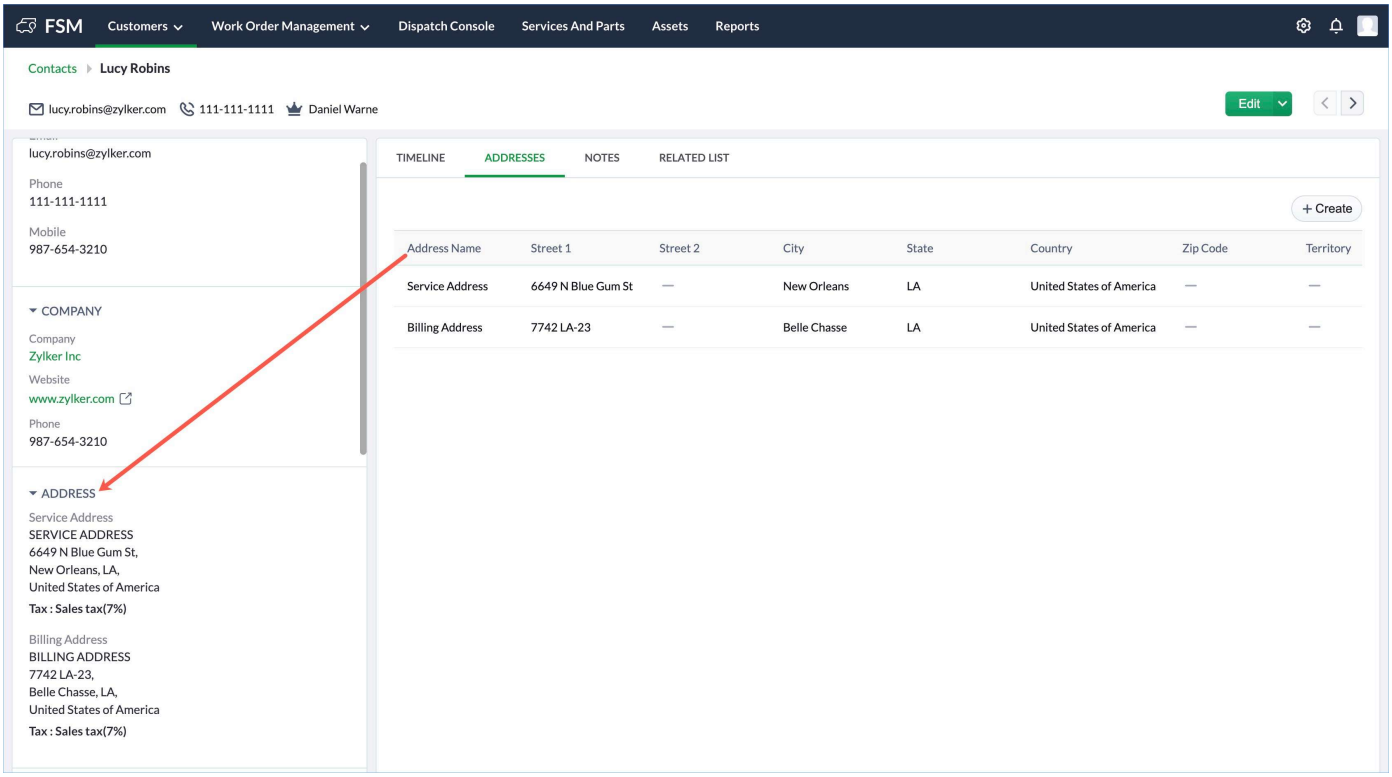
Address ID	Contact ID	Company	Address Owner	Address Name	Street 1	Street 2	City	State	Zip code	Country	Territory	Taxable	Tax	Tax Percentage	Tax Authority	Tax Exemption Code	Currency
13234535	17012200001	1011000000195085	Daniel Warne	Service Address	6649 N Blue Gum St		New Orleans	LA	70116	United States of America	Los Angeles	TRUE	Sales tax	7	State Tax Authority	FALSE	USD
13234536	17012200001	1011000000195085	Daniel Warne	Billing Address	7742 LA-23		Belle Chasse	LA	70037	United States of America	Los Angeles	TRUE	Sales tax	7	State Tax Authority	FALSE	USD

While importing, ensure that the following steps are followed:

1. For the **Service Address** and **Billing Address** fields, the **Address Name** is selected as the identifier.



The addresses will be added and linked as the Service and Billing address.



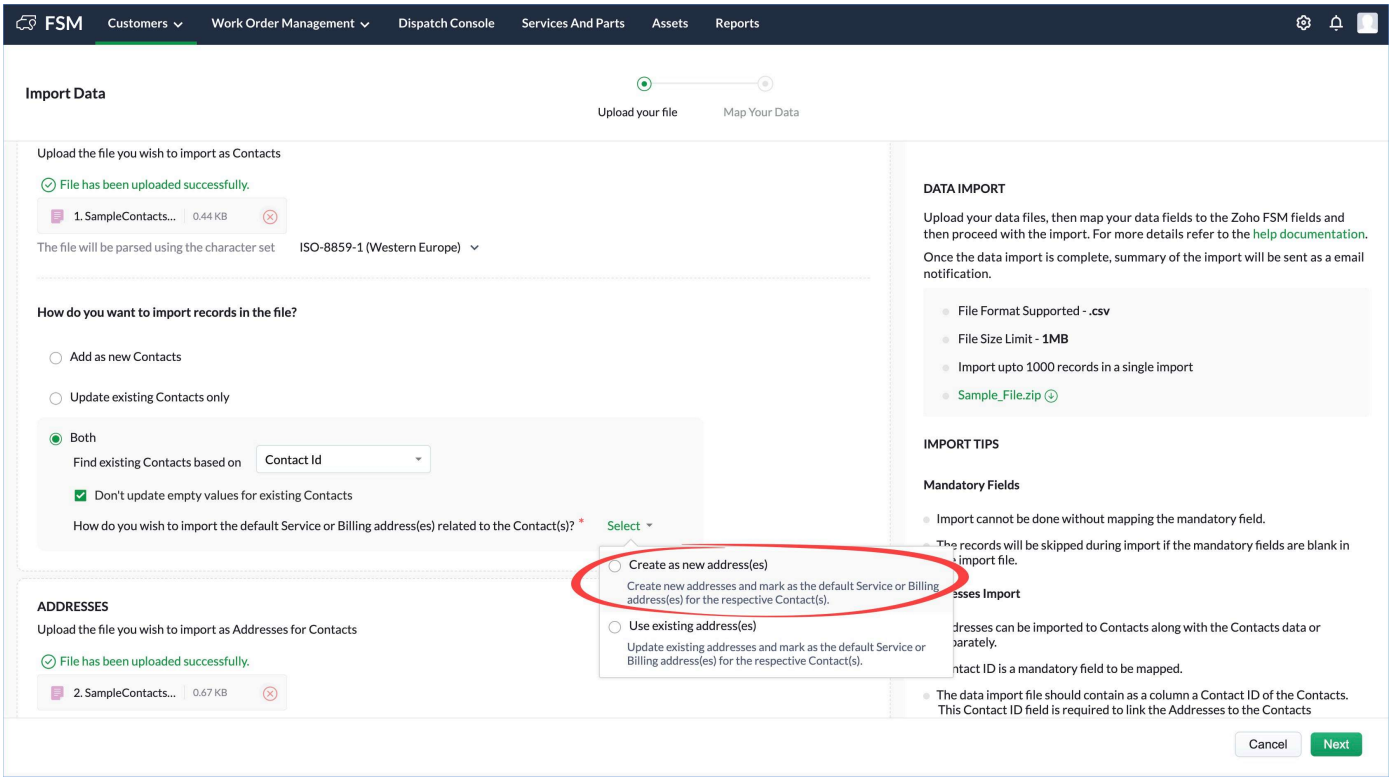
II. Address Import while updating existing records

You can update the Service and Billing addresses of existing records through import. This can be done in two different ways:

- Create as new addresses
- Use existing addresses

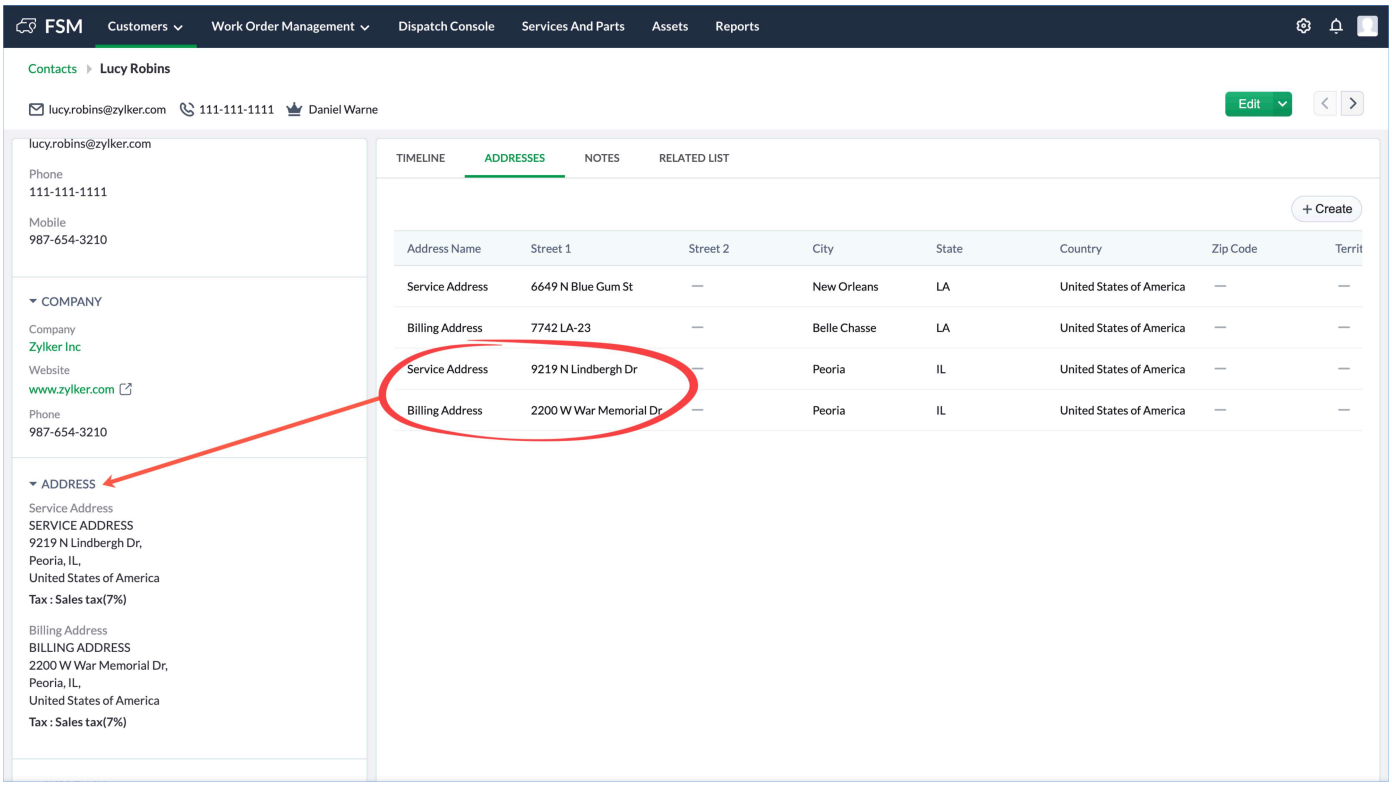
<u>Create as new addresses</u>

Using this option you can add new addresses to existing records and designate them as Service or Billing.



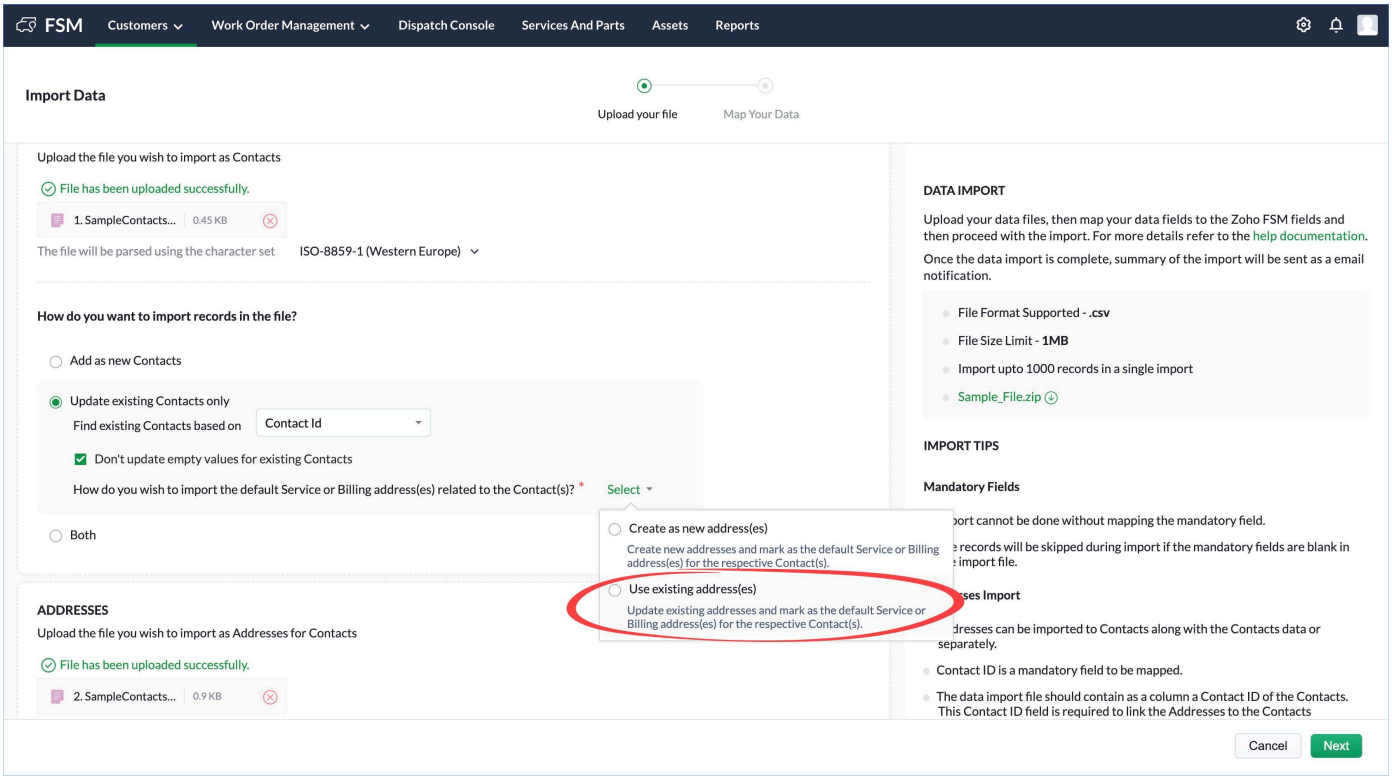
Create as new addresses will be available only if the Address CSV file is uploaded. You can **Find existing Contacts based on** either the Record ID or Email.

The addresses can be imported using the Address ID or Address Name as explained previously. The newly imported addresses will be added and designated as Service and Billing addresses.



Use existing addresses

Using this option you can update the existing Service or Billing addresses of existing records or add new addresses to existing records.

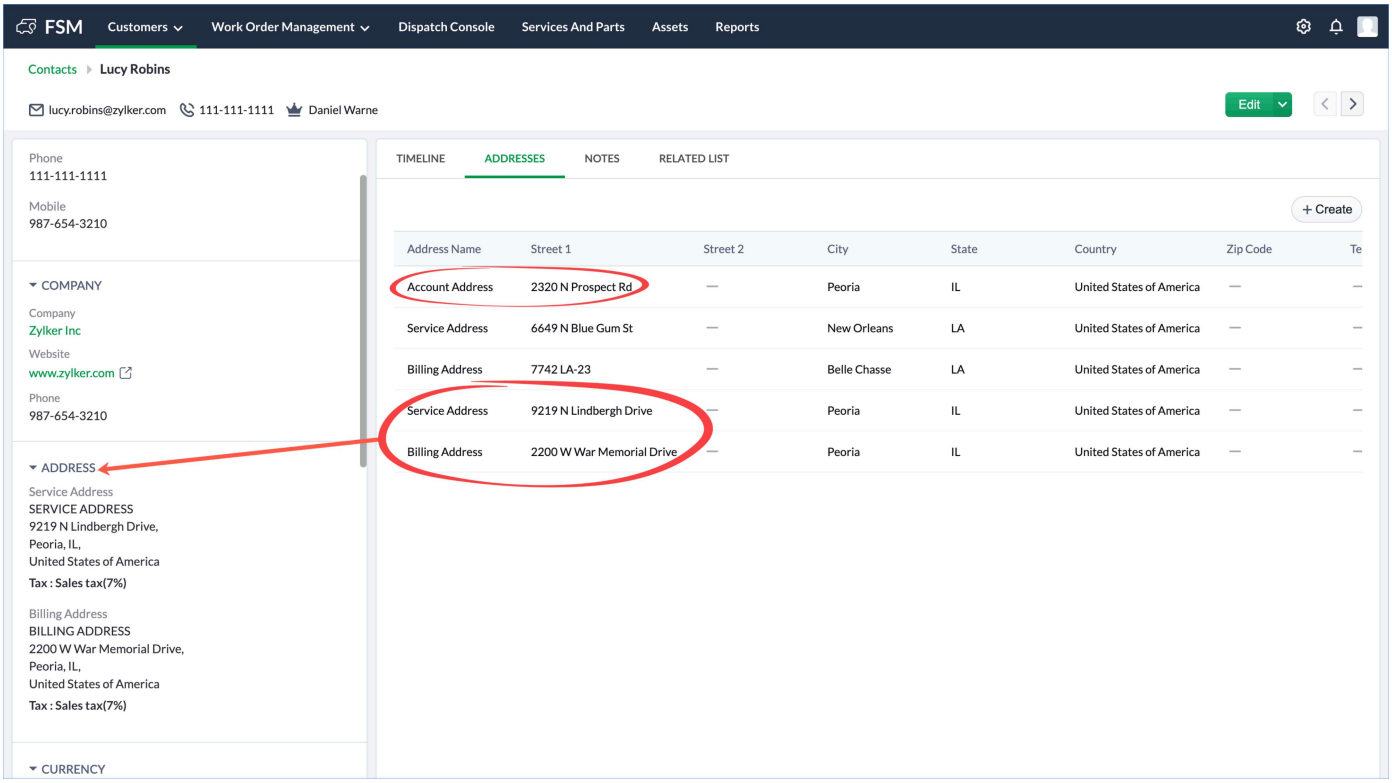


Ensure that the Address Names of the addresses from the Address CSV file that you want to update are mapped to the corresponding Address columns in Parent CSV file.

Contact ID	First Name	Last Name	Contact Owner	Email	Phone	Mobile	Company ID	Company Name	Service Address	Billing Address	Taxable	Tax	Tax Percentage	Tax Authority	Tax Exemption Code	Currency
101100000274075	Lucy	Robins	Daniel Warne	lucy.robins@zylker.com	111-111-1111	987-654-3210	1011000000195085	Zylker Inc	Service Address	Billing Address	TRUE	Sales tax	7	State Tax Authority	FALSE	USD

Address ID	Contact ID	Company	Address Owner	Address Name	Street 1	Street 2	City	State	Zip code	Country	Territory	Taxable	Tax	Tax Percentage	Tax Authority	Tax Exemption Code	Currency
13234535	1011000000274075	1011000000195085	Daniel Warne	Service Address	9219 N Lindbergh Drive		Peoria	IL	61615	United States of America	Los Angeles	TRUE	Sales tax	7	State Tax Authority	FALSE	USD
13234536	1011000000274075	1011000000195085	Daniel Warne	Billing Address	2200 W War Memorial Drive		Peoria	IL	70037	United States of America	Los Angeles	TRUE	Sales tax	7	State Tax Authority	FALSE	USD
13234537	1011000000274075	1011000000195085	Daniel Warne	Account Address	2320 N Prospect Rd		Peoria	IL	61603	United States of America	Los Angeles	TRUE	Sales tax	7	State Tax Authority	FALSE	USD

The mapped addresses will get updated and the unmapped address will get added as a new address.



If you intend to use the Address ID to map the addresses, then the Address ID can be obtained from the Addresses export file of the parent module.

FAQs - Errors

In the CSV file, if certain rows contain invalid data, those rows in the CSV file will be skipped while importing. The reasons for omitting the rows will be mentioned in the file attachment included in the import completion notification. Given below are some of the reasons (errors) for which the data in the rows might get omitted:

1. The following mandatory field(s) were left empty:
   If the value for a mandatory field is left empty in the CSV file, then those rows will be skipped. For example, if one of the entries in the Contacts CSV file does not have the value for the mandatory field Last Name, then that entry will be skipped and a record will not be created for that entry.

2. Unknown date format: please use the date format chosen during import.
   If the date format of the dates in the CSV file is different from the format chosen during import, then those rows will be skipped. For example, if the format of the date selected for Ordered Date is dd/MM/yyyy HH:mm and one of the entries in the Assets file has Ordered Date as 17-06-2022 16:00, then this entry will be skipped and a record will not be created for that entry.

3. Could not find a matching parent record for this lookup field.
   If the values for lookup fields included in the CSV file are not already present in the application, then those rows will be skipped. For example, if the Company Name in one of the entries in the Contacts CSV file is "Acme Inc", and the Company "Acme Inc" is not present in the application, then this entry will be skipped and a record will not be created for that entry.

4. The following mandatory tax field(s) were left empty:
   If the value for a mandatory tax field is left empty in the CSV file, then those rows will be skipped. For example, if one of the entries in the Contacts CSV file does not have the value for the mandatory tax field Tax Name, then that entry will be skipped and a record will not be created for that entry.

5. Invalid tax details
   In the CSV file, if an invalid value for VAT Treatment is provided for the UK edition, or an invalid value for Place of Supply, GST Treatment is provided for the India edition, then those rows will be skipped and records will not be created for those entries.

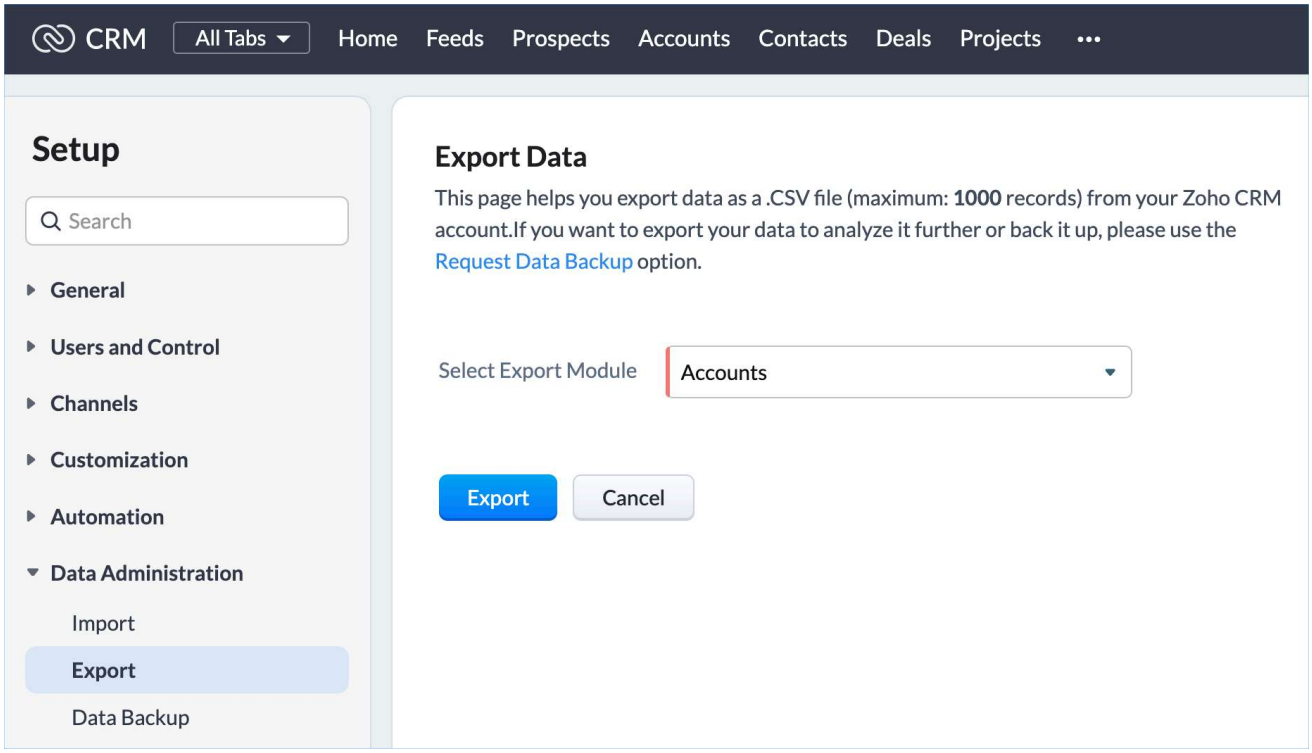
Import Zoho CRM data into FSM

You can export data from Zoho CRM and import the same into FSM. Consider the example of importing Zoho CRM Accounts along with their addresses into FSM. To do so, follow the below steps:

1. Export data from Zoho CRM
2. Prepare the import files for FSM
3. Import the data into FSM

Export data from Zoho CRM

1. Log in to your Zoho CRM account.
2. Navigate to **Setup** > **Data Administration** > **Export**.
3. For **Select Export Module**, choose **Accounts** and click **Export**.

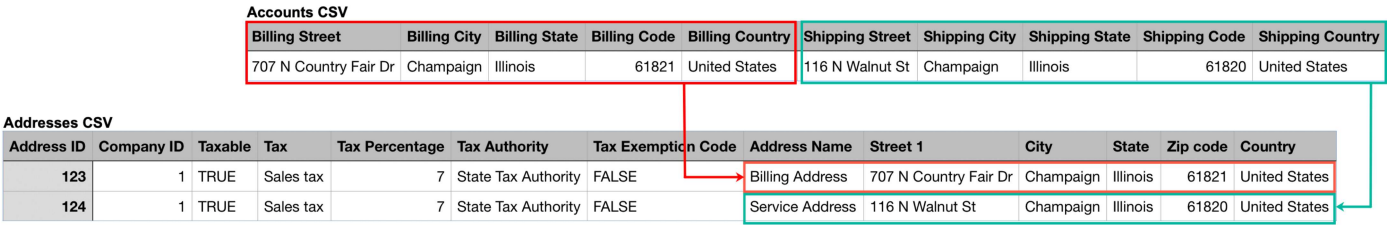


The Accounts CSV will be downloaded.

Prepare the import files for FSM

From the data obtained from the Accounts CSV, prepare two CSV files for importing data into FSM - Companies, Addresses

In the Accounts CSV obtained from Zoho CRM, the Billing Address and Shipping Address values for an account will be in a single entry. While creating the Addresses CSV file for FSM, you need to separate these values for Billing Address and Shipping Address and create rows for Billing Address and Service Address respectively. Please refer to the screenshot below:



Accounts CSV

Billing Street	Billing City	Billing State	Billing Code	Billing Country	Shipping Street	Shipping City	Shipping State	Shipping Code	Shipping Country
707 N Country Fair Dr	Champaign	Illinois	61821	United States	116 N Walnut St	Champaign	Illinois	61820	United States

Addresses CSV

Address ID	Company ID	Taxable	Tax	Tax Percentage	Tax Authority	Tax Exemption Code	Address Name	Street 1	City	State	Zip code	Country
123	1	TRUE	Sales tax	7	State Tax Authority	FALSE	Billing Address	707 N Country Fair Dr	Champaign	Illinois	61821	United States
124	1	TRUE	Sales tax	7	State Tax Authority	FALSE	Service Address	116 N Walnut St	Champaign	Illinois	61820	United States

Sample Companies, and Addresses CSV files if importing using Address Name

Company ID	Company Name	Taxable	Tax	Tax Percentage	Tax Authority	Tax Exemption Code	Service Address	Billing Address
1	Zylker Inc	TRUE	Sales tax	7	State Tax Authority	FALSE	Service Address	Billing Address

Address ID	Company ID	Taxable	Tax	Tax Percentage	Tax Authority	Tax Exemption Code	Address Name	Street 1	City	State	Zip code	Country
123	1	TRUE	Sales tax	7	State Tax Authority	FALSE	Billing Address	707 N Country Fair Dr	Champaign	Illinois	61821	United States
124	1	TRUE	Sales tax	7	State Tax Authority	FALSE	Service Address	116 N Walnut St	Champaign	Illinois	61820	United States

Sample Companies, and Addresses CSV files if importing using Address ID

Company ID	Company Name	Taxable	Tax	Tax Percentage	Tax Authority	Tax Exemption Code	Service Address	Billing Address
1	Zylker Inc	TRUE	Sales tax	7	State Tax Authority	FALSE	124	123

Address ID	Company ID	Taxable	Tax	Tax Percentage	Tax Authority	Tax Exemption Code	Address Name	Street 1	City	State	Zip code	Country
123	1	TRUE	Sales tax	7	State Tax Authority	FALSE	Billing Address	707 N Country Fair Dr	Champaign	Illinois	61821	United States
124	1	TRUE	Sales tax	7	State Tax Authority	FALSE	Service Address	116 N Walnut St	Champaign	Illinois	61820	United States

The tables below give details about the Zoho CRM fields whose values you need to use in the FSM CSV files.

Companies CSV file

FSM Field	Zoho CRM Source Field
Company Name	Account Name

Addresses CSV file

FSM Field	Zoho CRM Source Field
Street 1	Billing Street / Shipping Street
City	Billing City / Shipping City
State	Billing State / Shipping State
Zip code	Billing Code / Shipping Code
Country	Billing Country / Shipping Country

Import the data into FSM

Use the Companies, and Addresses CSV file to import the data into FSM.

Sample CSV files

Given below are some sample CSV files for the US edition.

Note: Please be aware that the record IDs used in the CSV files are temporary placeholders, and new IDs will be automatically generated once the records are created in Zoho FSM.

https://help.zoho.com/portal/en/kb/fsm/data-administration/articles/importing-data-to-zoho-fsm