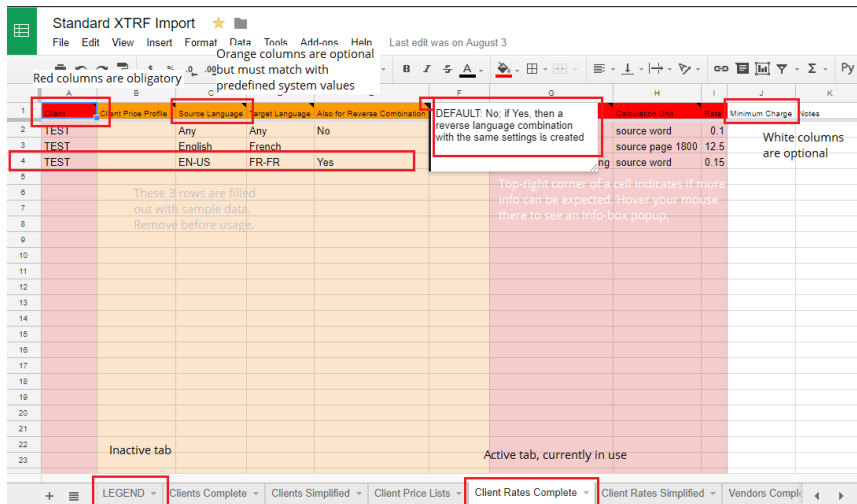


# Importing Data

XTRF Platform allows for quickly importing of large amounts of data to your database. The Import function is available for Clients, Client Contact Persons, Client Rates, Client Price List Rates, Vendors, Vendor Contact Persons, Vendor Rates, Vendor Price List Rates and CRM activities.

Follow this Google Drive link <https://drive.google.com/open?id=1Sd7fJ36RHOltQ6FdcUNzAH-rnpPdU9hJuCxQ8SY08bg> to access a spreadsheet file that contains various tabs for various data types you may want to import.



The LEGEND tab is the first one and provides for general remarks and more detailed explanation.

Expect the following tabs (Complete mean all fields possible to import are present, whereas Simplified is a selection of basic fields):

- Clients Complete
- Clients Simplified
- Client Price Lists
- Client Rates Complete
- Client Rates Simplified
- Vendors Complete
- Vendors Simplified
- Vendor Price Lists
- Vendor Rates Complete
- Vendor Rates Simplified
- Contacts Complete
- Contacts Simplified
- CRM

As none of the sheets is editable, export the ones you need by going to File > Download as... > Tab-separated values (.tsv, current sheet) - see picture below.

Standard XTRF Import

File Edit View Insert Format Data Tools Add-ons Help

Share... view only

New

Open... Ctrl+O

Rename...

Make a copy...

Move to trash

Import...

Version history

Download as

- Microsoft Excel (.xlsx)
- OpenDocument format (.ods)
- PDF document (.pdf)
- Web page (.html, zipped)
- Comma-separated values (.csv, current sheet)
- Tab-separated values (.tsv, current sheet)

Publish to the web...

Email collaborators...

Email as attachment...

Document details...

Spreadsheet settings...

Print Ctrl+P

E	F	G	H	I
Gender	Position	Department	Use Partner Address	Address > Adc
female	CTO	Board	YES	

Do you want to see XTRF in action?

[Request a demo](#)