Companies Import

Using Mria CRM · https://mriacrm.com/docs/companies-import/

The **Companies Import** tool allows you to bulk upload Companies from external sources directly into Mria CRM.

You can access it either from the **Companies section** or under **Settings → Data Administration → Companies** — the process is identical in both places.

Getting Started

Before importing, you can:

- Download a sample file (`.CSV` or `.XLSX`) to understand the correct structure. The sample file now includes columns for any custom fields configured on Companies, so you can see exactly where to enter their values.
- Export Companies from another CRM — Mria CRM supports files exported "as is" from most common systems.

Compared to Contacts Import, the setup here is simpler. Companies do not include extra linking options during import, so the process focuses on uploading the file, mapping fields and values, and deciding how to handle duplicates.

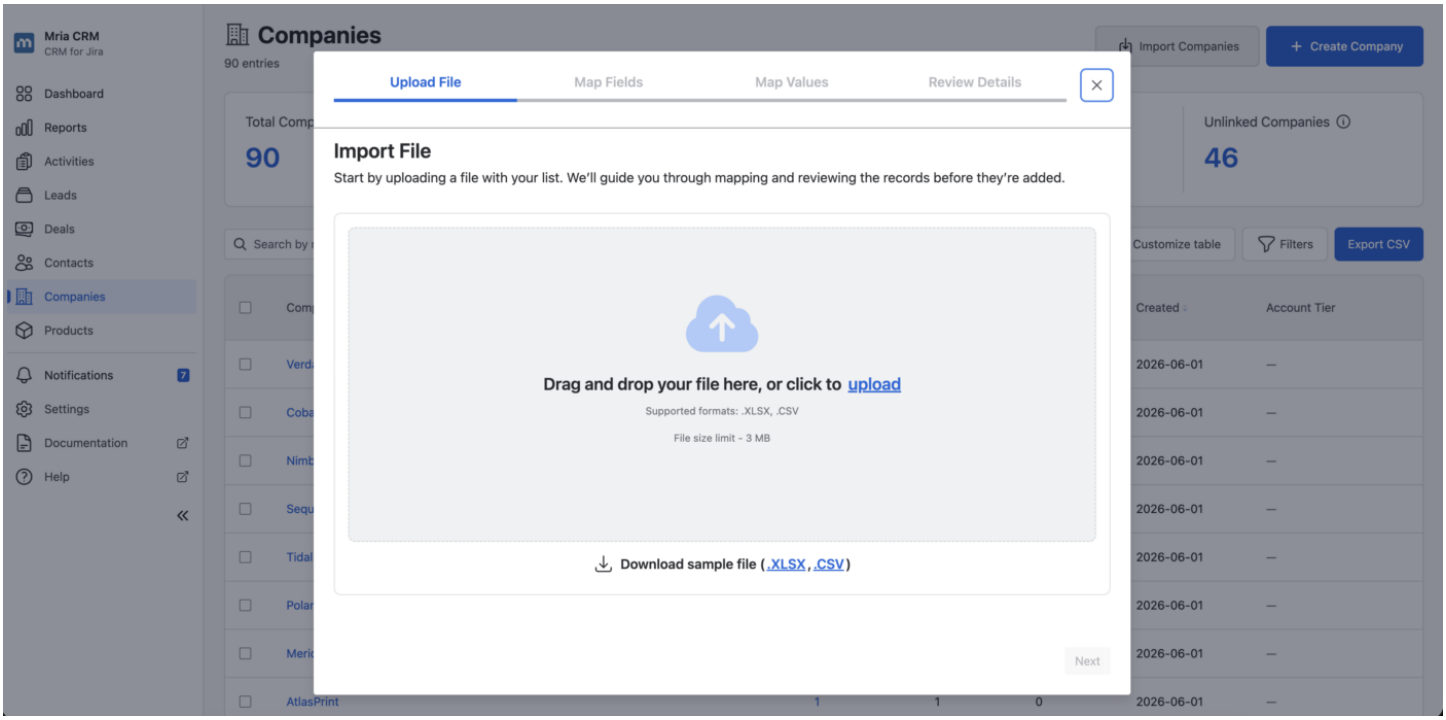
Maximum file size: **3 MB**

Step 1. Upload File

Drag and drop your file or click **upload** to browse your computer.

Supported formats: `.XLSX` , `.CSV`
Maximum file size: **3 MB**

Once uploaded, click **Next** to move to the field-mapping step.



Step 2. Map Fields

Mria CRM tries to auto-match your file columns to system fields based on similar names.

For example, columns like **Company**, **Company Name**, or **Name** may all map to **Company Name** automatically.

You can:

- Change the mapping by clicking × next to a field and selecting another option.
- Leave an **optional** field unmapped — that column simply will not be imported. The required fields below are the exception: they have to be mapped for the import to run.

Required field:

- **Company Name**

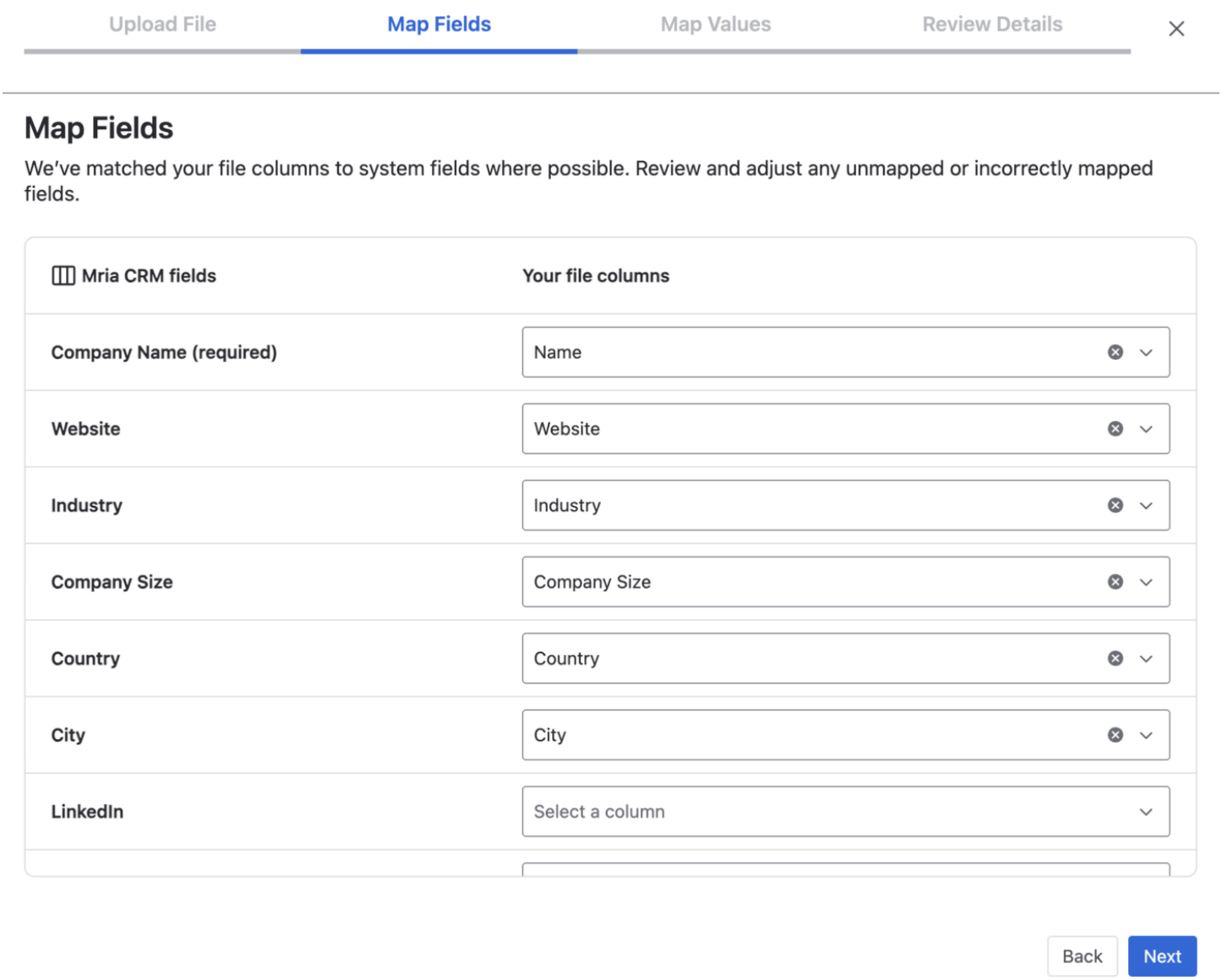
> **Required fields cannot be skipped.** If your file has no column for one of them, add it before uploading rather than trying to map around it.

Optional fields may include:

- Type

- Website
- Industry
- Company Size
- Country
- City
- LinkedIn
- State
- ZIP
- Address
- Phone

Custom fields: Any Custom Fields configured on Companies also appear in this list alongside the standard fields. They follow the same auto-match rules — a column named *Account Tier* will map to an Account-Tier custom field automatically. You can map, change, or skip them just like any other field.



Two file columns can be mapped onto a single field — map a first-name and a last-name column onto **Name** and the wizard joins them, with a **Join with** choice of Space, Comma, Hyphen or None and a live preview. See Contacts Import for the detail.

Step 3. Map Values

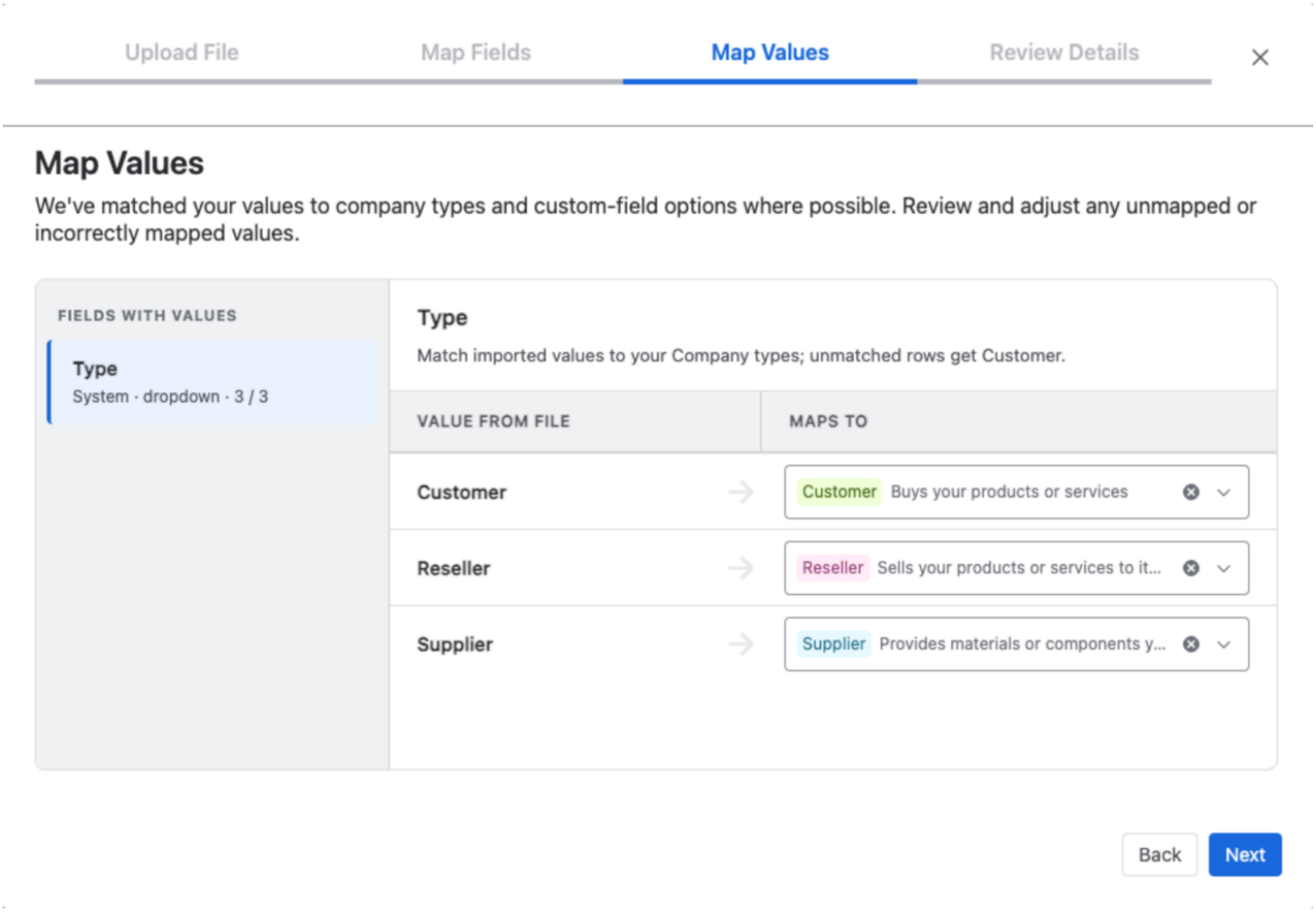
For fields whose values come from a fixed list, Mria CRM matches the values in your file to the options configured in the CRM: the built-in **Type** field, and any custom Dropdown, Multi-select or Labels field on Companies.

The Fields with values sidebar on the left lists every field that has values to map. For each one, you'll see:

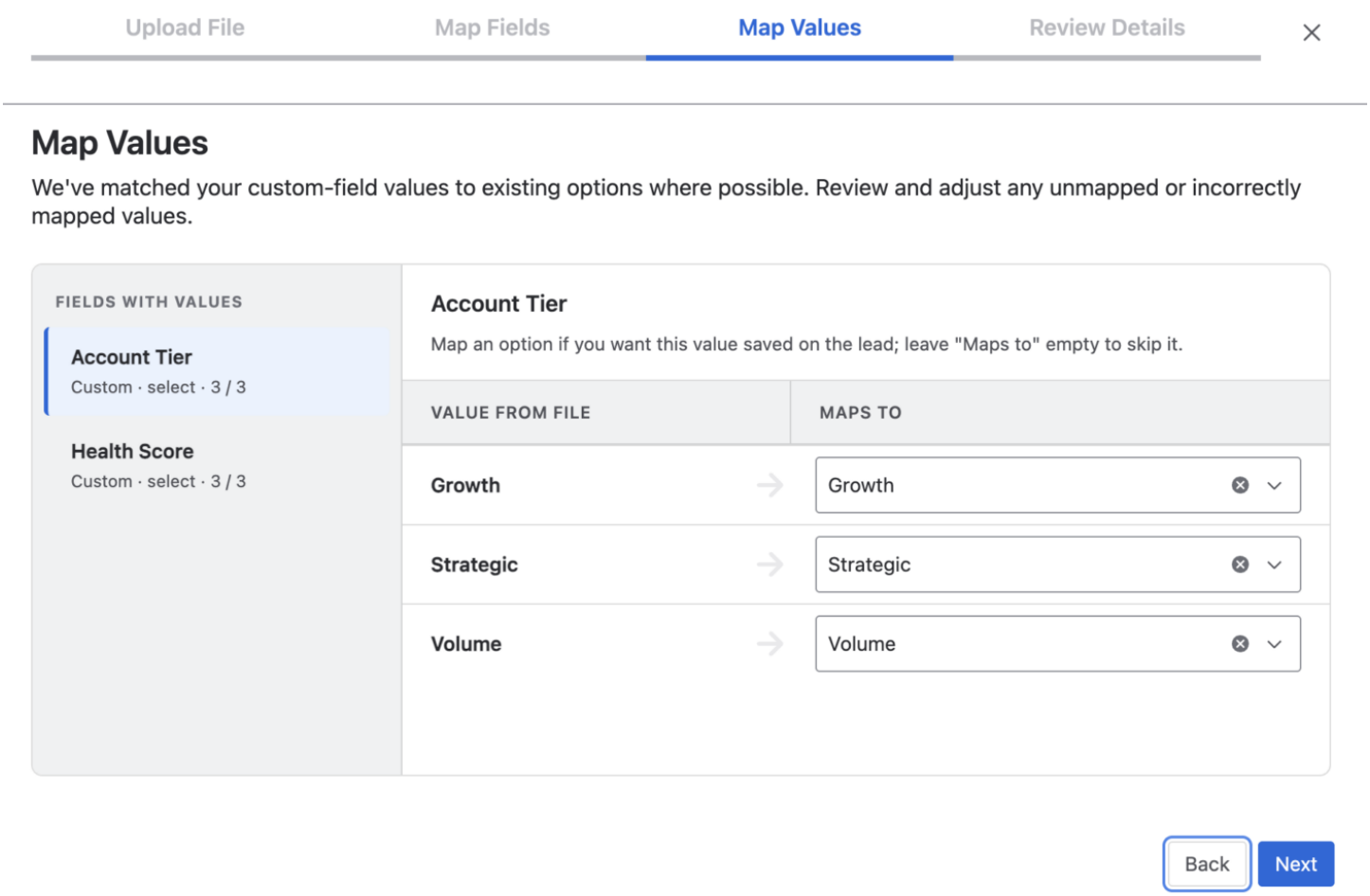
- The field name, labeled System or Custom.
- The field type (dropdown, select, multi-select, labels).
- A counter showing how many file values are mapped vs. the total found (for example, `3 / 3` means every value found in your file is mapped).

Click any field in the sidebar to review and adjust its mapping on the right. For each value found in your file, choose the matching CRM option from **Maps to** — or leave it empty to skip that value.

Type is listed as `System · dropdown`. Each value in your file is matched to one of your Company types — and unmatched rows get Customer:



If your file has no Type column and there are no custom picklist fields on Companies, this step may show as empty and you can proceed directly to Review Details.



Step 4. Review Details

Before importing, review the **Import Summary** to confirm the row count and ready-to-import count, then choose how the system should handle duplicate Companies.

Duplicate matching

Companies are matched by:

- **Company Name + Website**

This helps distinguish Companies with similar names when a website is available. The Review Details summary surfaces the duplicate count directly so you know what to expect before confirming.

Duplicate handling options

1. Update existing companies

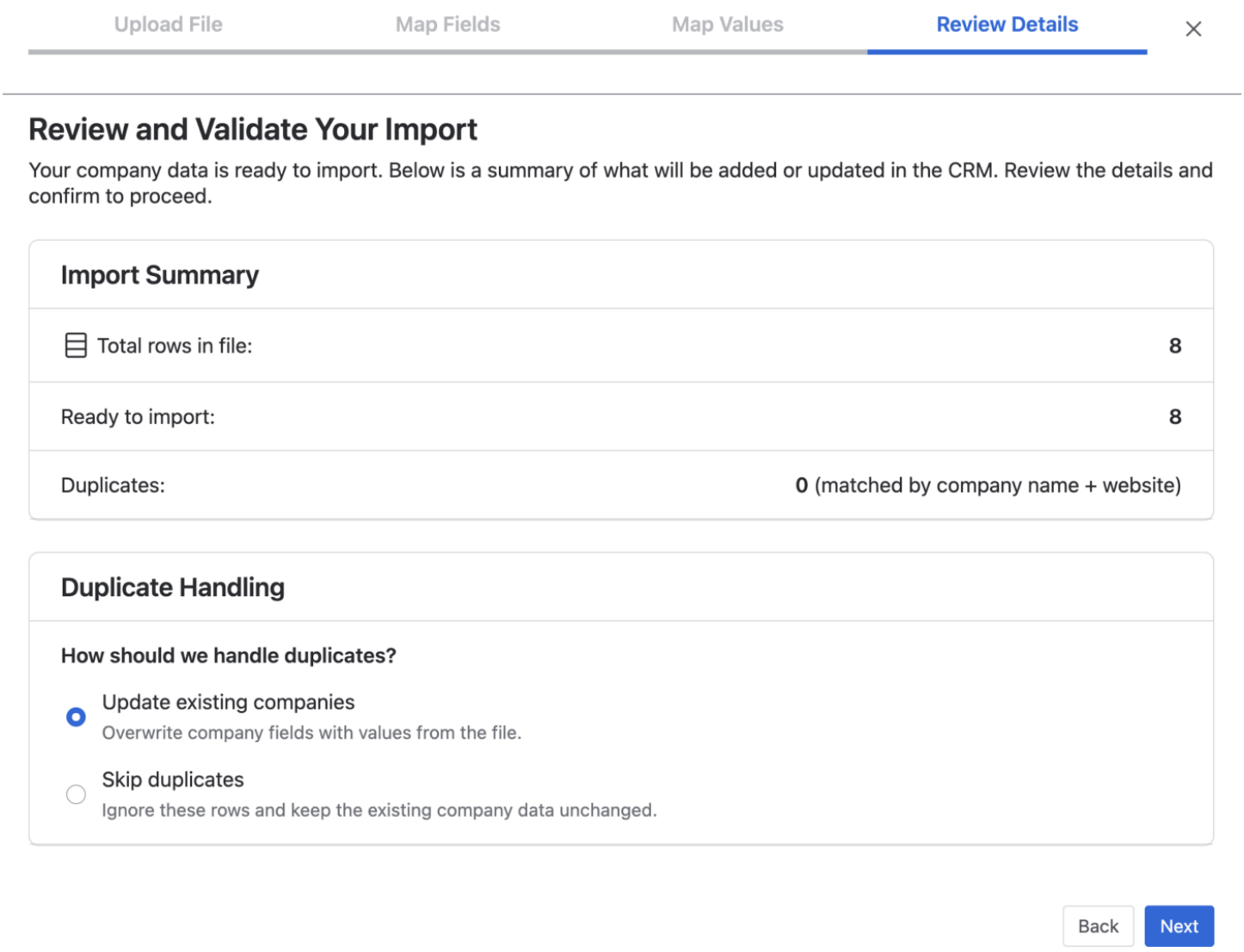
If a matching Company already exists in CRM, Mria CRM will overwrite its fields with values from your file.

This updates Company details such as:

- Website
- Industry
- Size
- Country
- City
- Address
- LinkedIn
- Custom fields
- and other imported fields

2. Skip duplicates

If a matching Company already exists, that row will be ignored and the existing CRM record will remain unchanged.



Step 5. Import in Progress

When the import starts, you'll see a progress indicator with a running count of records processed (for example, `0 / 8 records processed`).
You can stay on this screen or click **Continue in Background** and keep working — the import will proceed automatically and you'll be notified when it finishes.

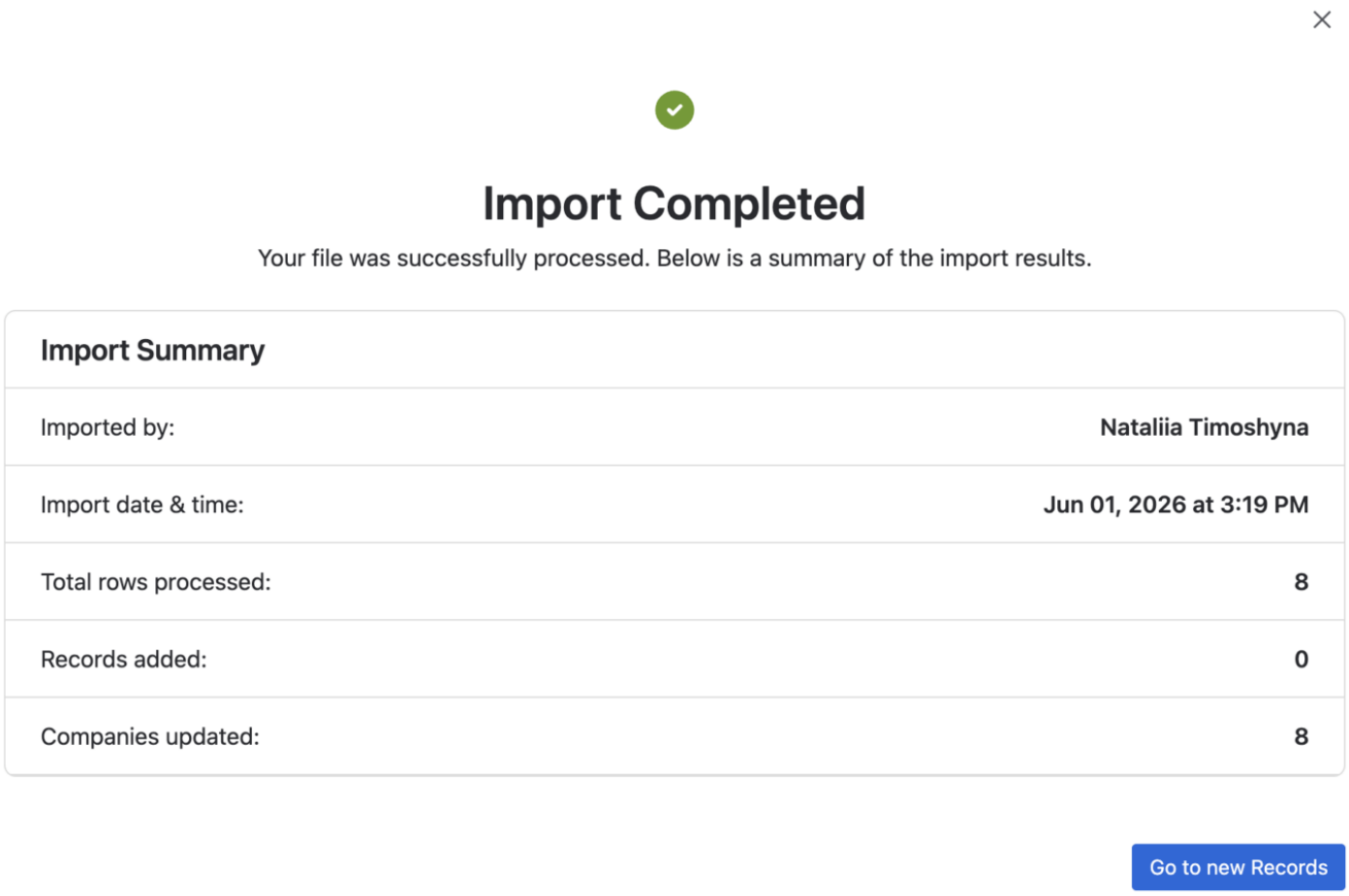
Step 6. Import Completed

After a successful import, you'll see:

- Imported by

- Import date & time
- Total rows processed
- Records added
- Companies updated

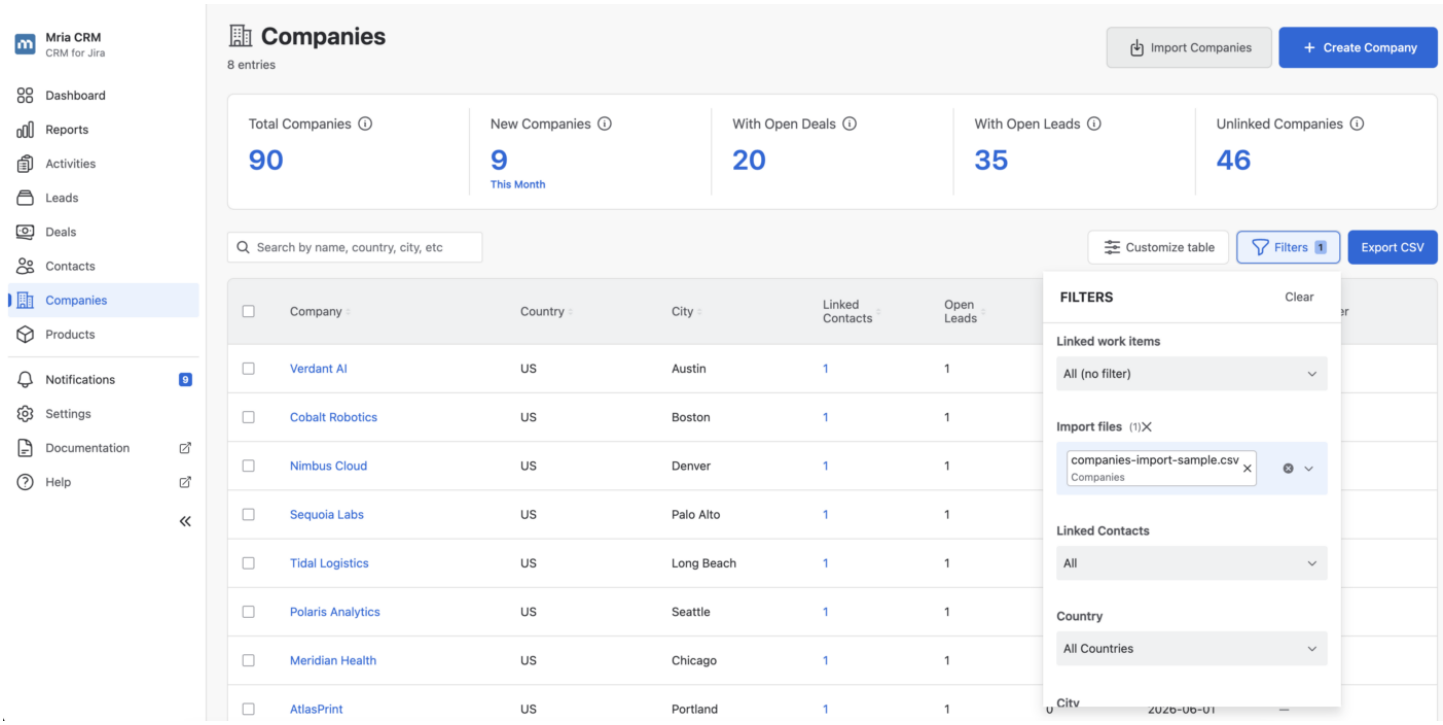
Click **Go to new Records** to view the imported Companies.



Viewing Imported Companies

You can find imported Companies in several ways:

- **From the notification** you receive after the import finishes.
- **From Settings → Data Administration → Companies**, by clicking the number in the **Records** column for the file you imported.
- **From the Companies list**, using the **Filters** panel — the **Import files** filter lets you pick one or more import files and see exactly the Companies that came from each.



Handling Import Errors

If your import fails, don't worry — all Companies processed before the error remain saved in Mria CRM.

You can re-upload the same file and run the import again. Then choose the duplicate handling option that best fits your case:

- **Update existing companies** — to refresh the Companies that were already imported before the error
- **Skip duplicates** — to import only the remaining Companies and leave already processed ones unchanged

This is especially helpful if the import stopped halfway due to a temporary platform issue.

Notifications

When the import finishes, you'll receive a notification in **Notifications** about the result.

This helps you confirm whether the import completed successfully or needs to be retried.