Leads Import

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

The **Leads Import** tool allows you to bulk upload Leads from external sources directly into Mria CRM. You can access it either from the Leads section or under **Settings → Data Administration → Leads** — the process is identical in both cases.

Getting Started

Before importing, you can:

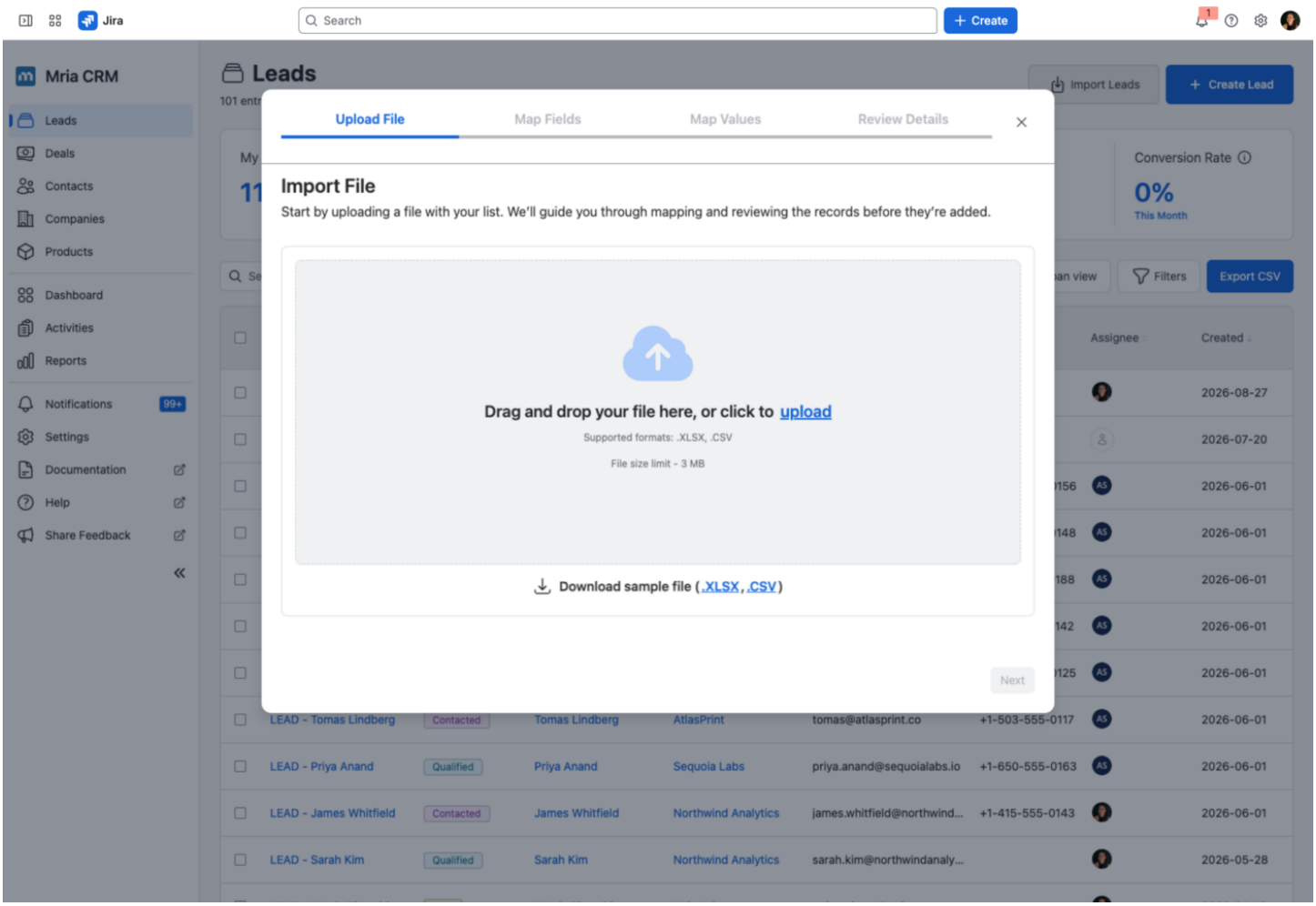
- **Download a sample file** (`.CSV` or `.XLSX`) to understand the correct data structure. The sample file now includes columns for any custom fields configured on Leads, so you can see exactly where to enter their values.
- **Export Leads** from another CRM — Mria CRM supports files exported "as is"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

> Maximum file size is **3 MB**. While large imports are supported, we recommend limiting each import to **no more than 10 000 Leads** for best performance.

Step 1. Upload File

Drag and drop your file or click **upload** to browse your computer.
Supported formats: `.XLSX` , `.CSV` .

Once the file is 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 using similar names.
For example, columns like *Name*, *Lead Name*, *Contact Name*, or *First Name* will all map to **Name** automatically.

You can:

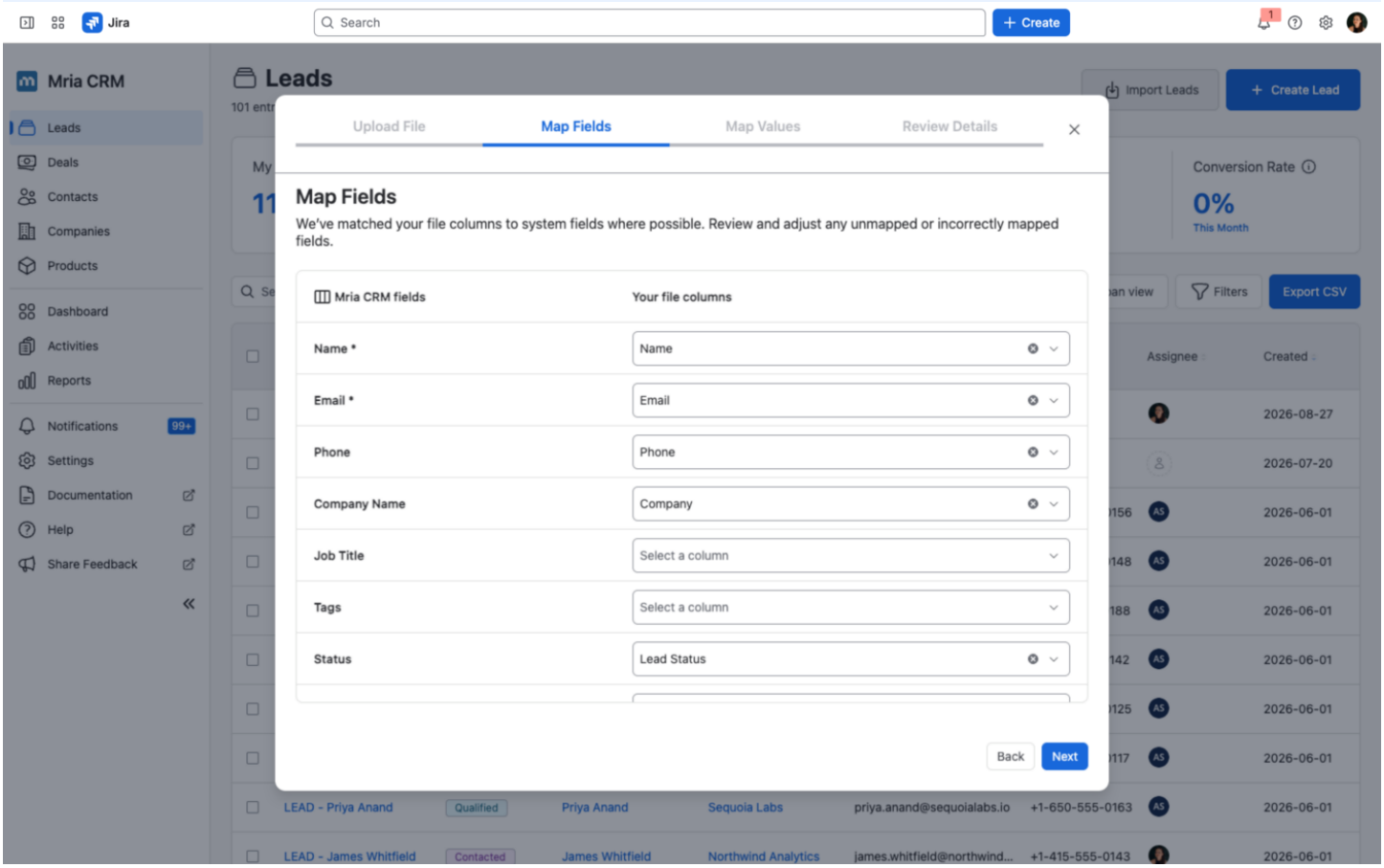
- Change a mapping by clicking the × next to a field and picking a different column.
- Leave an **optional** field unmapped — that column simply will not be imported. The required fields below are the exception: they have to be mapped for the import to run.

Required fields:

- `Name`
- `Email`

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.

Custom fields: Any Custom Fields configured on Leads also appear in this list alongside the standard fields. They follow the same auto-match rules — a column named *Lead Score* will map to a Lead-Score 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 — **Lead Status**, **Lead Source**, **Products**, and any custom **Dropdown**, **Multi-select**, or **Labels** field — Mria CRM matches the values in your file to the options configured in the CRM.

The **Fields with values** sidebar on the left lists every field that needs value mapping. For each one, you'll see:

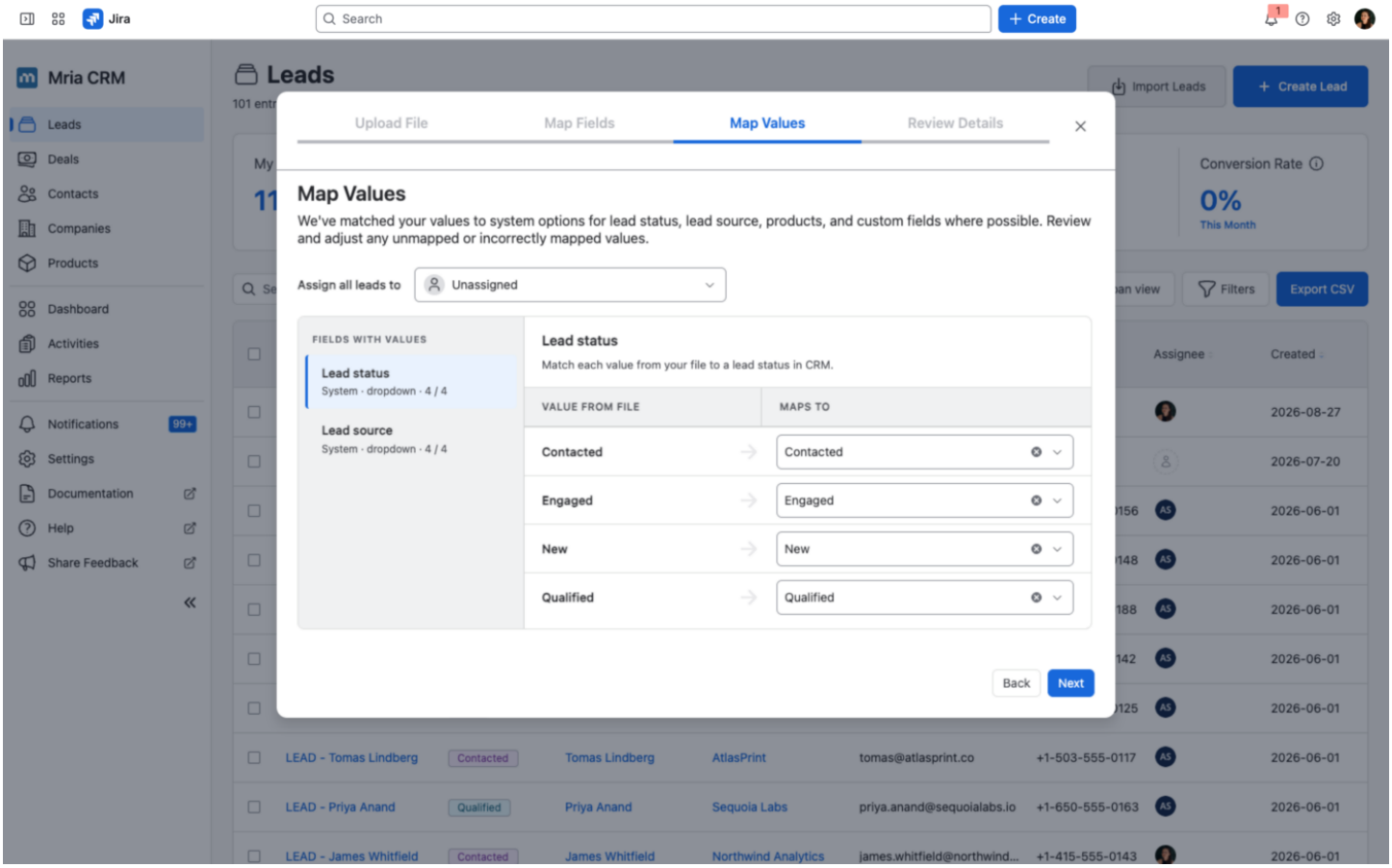
- The field name and whether it's a **System** field or a **Custom** field.
- The field type (dropdown, select, labels, etc.).
- A counter showing how many file values are mapped vs. the total found (for example, `6 / 6` means every value found in the file is mapped).

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.

You can also **Assign all Leads to** a specific user from the dropdown at the top of this step.

Products: If your file has a **Products** column, its values are matched here to **existing Products in your catalog**. You can't create new Products through Leads Import — add them first via Products Import, then re-run the Leads Import.

Fetching and processing values may take a short while, especially for large files. Once ready, review each field carefully — for instance, make sure *Follow Up* from your file maps to *Follow-up* in the CRM, or that a *Lead Score* value of *HOT* maps to *Hot*.



Step 4. Review Details

Before importing, review the **Import Summary** to confirm that the number of rows looks correct, then choose how the system should treat duplicates.

Duplicate Handling Options

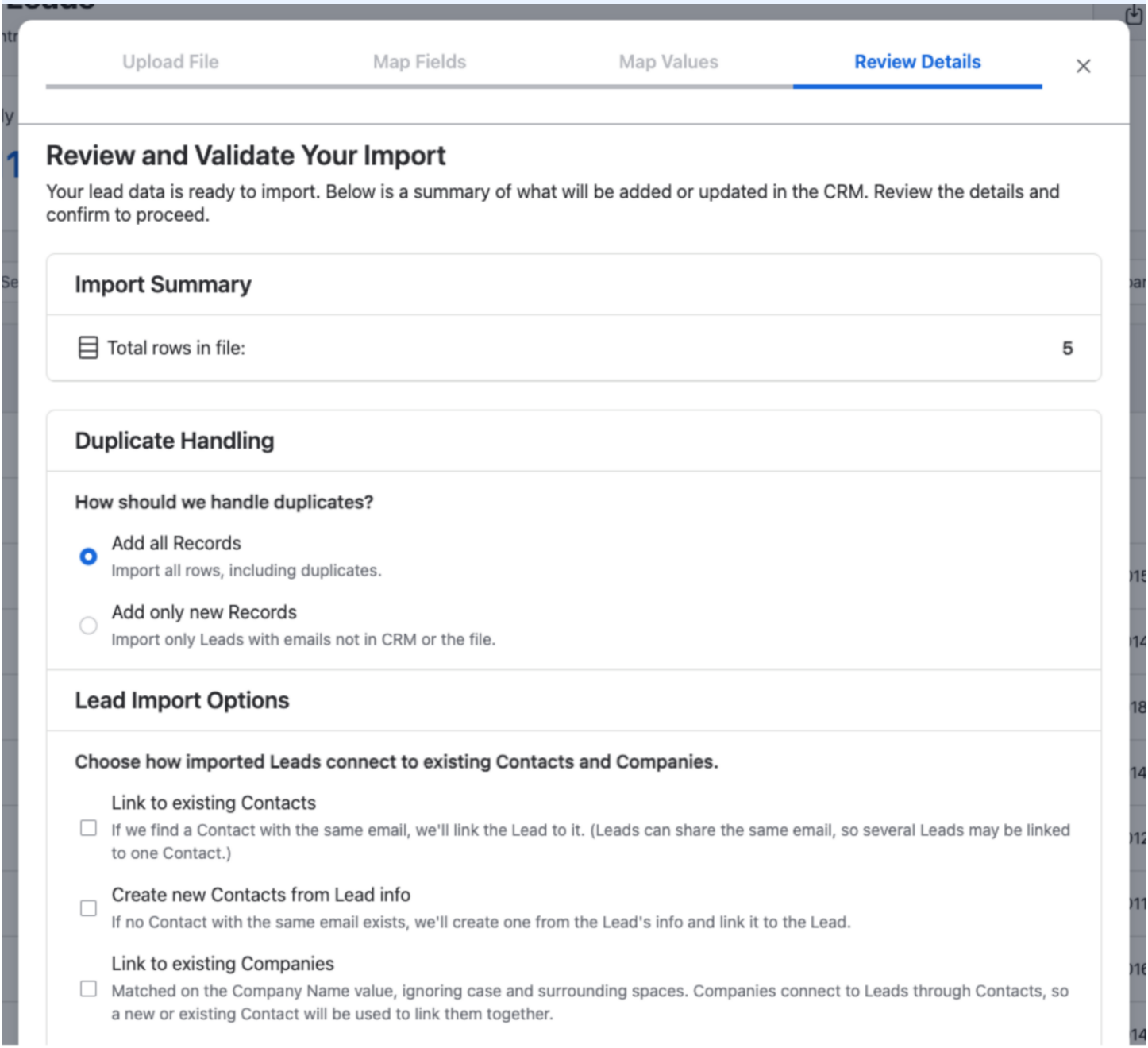
Option	Description
Add all Records	Imports all rows, including duplicates.
Add only new Records	Imports only Leads whose email addresses are not already in the CRM **and** do not repeat within the uploaded file.

Examples:

- If your file has 10 rows with `user@example.com` and that email already exists in CRM → no new Leads will be created.

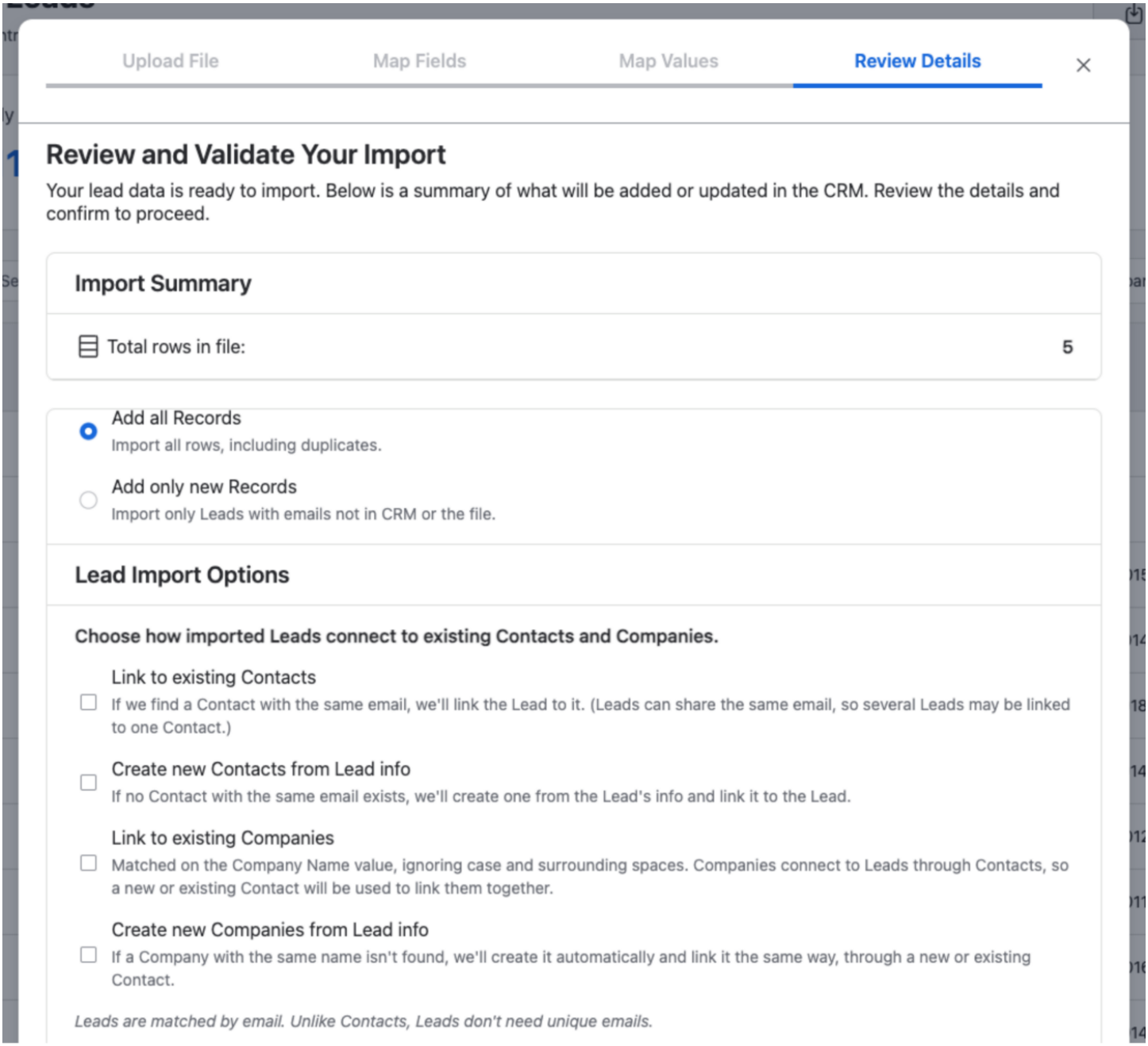
- If your file has 10 rows with `user@example.com`, but that email is not in CRM → only one new Lead will be created.

Choosing *Add only new Records* is the safest option if you're re-uploading a file that partially imported earlier.



Lead Import Options

The same card also carries four checkboxes that decide how imported Leads connect to the Contacts and Companies you already have. They are the Lead equivalent of the options on Contacts Import, and all four are optional.



1. Link to existing Contacts

If a Contact with the same email already exists, the imported Lead is linked to it.

- Leads are matched to Contacts by **email**.
- Unlike Contacts, Leads do **not** have to be unique by email, so several Leads can end up linked to the same Contact.

2. Create new Contacts from Lead info

If no Contact with that email exists, one is created from the Lead's own details and linked to it.

3. Link to existing Companies

Companies are matched on the **Company Name** value, **ignoring case and surrounding spaces**. If a match is found:

- exactly one match → it is linked;
- more than one Company with that name → linking is skipped, to avoid guessing.

Companies connect to Leads **through Contacts**, so a new or existing Contact is used to make the link. That means a Company link needs one of the Contact options above to have produced a Contact.

4. Create new Companies from Lead info

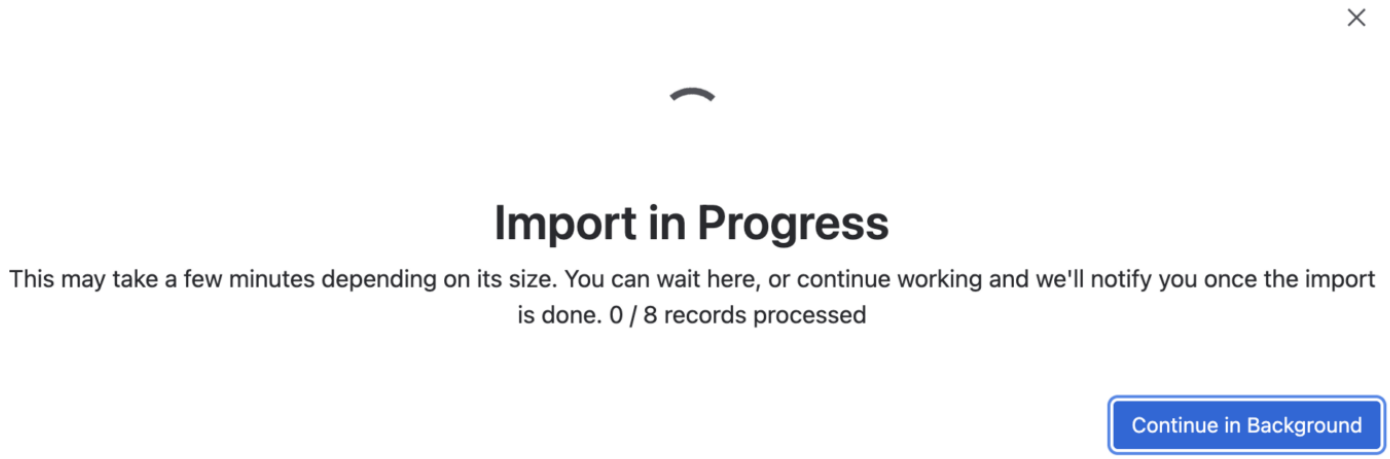
If no Company with that name is found, it is created automatically and linked the same way — through a new or existing Contact.

> **Summary of Lead matching rules**
> Leads are matched to Contacts by email. Leads themselves are never deduplicated by these options — that is what the **Duplicate Handling Options** above control. Companies are matched by name, and nothing is ever unlinked by an import; only new links are created.

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.

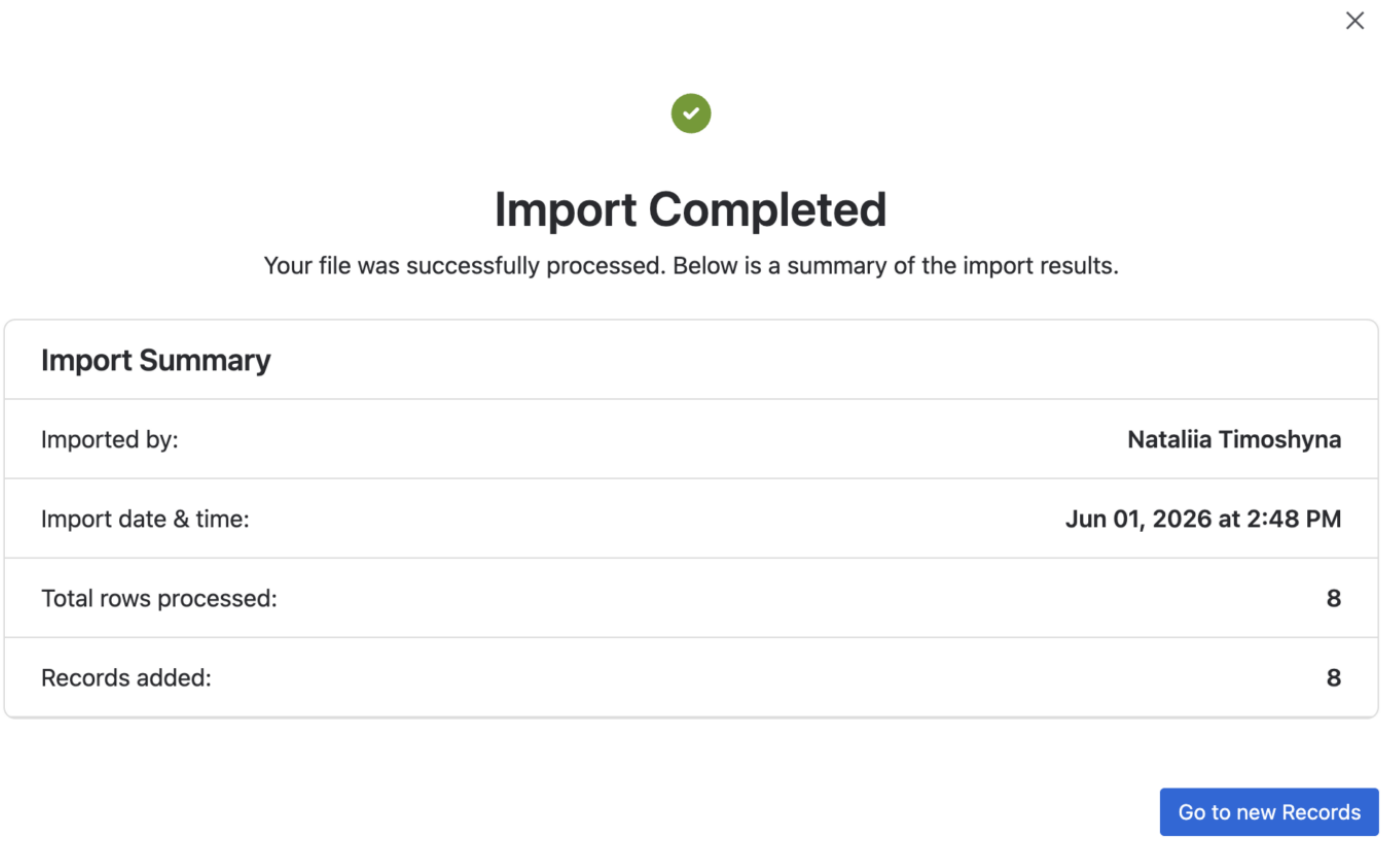


Step 6. Import Completed

After successful completion, a summary screen confirms the results:

- Imported by
- Import date & time
- Total rows processed
- Records added

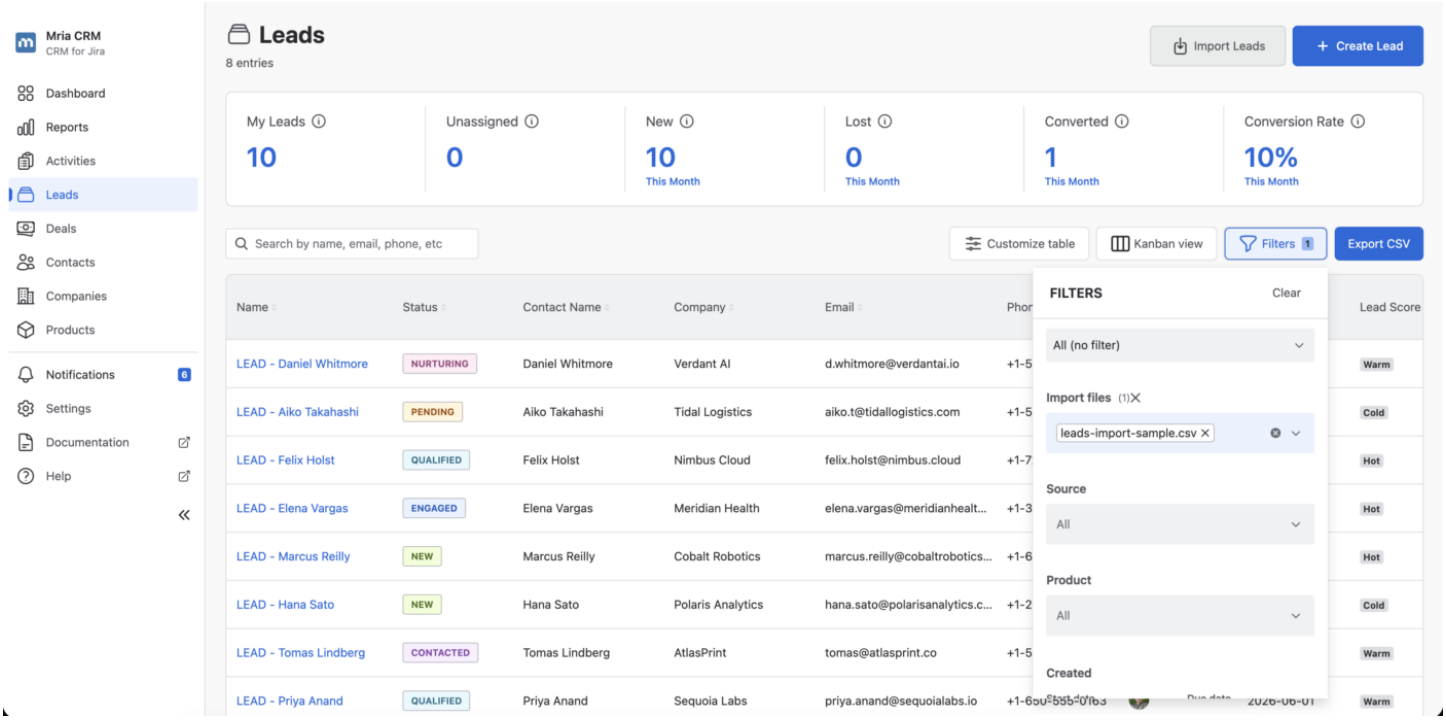
Click **Go to new Records** to view the imported Leads.



Viewing Imported Leads

You can find the newly imported Leads in several ways:

- **From the notification** you receive when the import finishes (success or failure).
- **From Settings → Data Administration**, by clicking the record count next to your import file.
- **From the Leads section**, using the **Filters** panel — the **Import files** filter lets you pick one or more import files and see exactly the Leads that came from each.



Handling Import Errors

Validation errors — finding the bad rows

If some of your data doesn't pass validation, Mria CRM reports what was wrong **and which rows caused it**. A typical error names the rule that failed, the column involved, and the **specific row numbers** from your file — for example an invalid website address in the `WEBSITE` column.

Use those row numbers to jump straight to the offending cells in your spreadsheet, fix them, and re-upload. This matters most on large files, where a single malformed value among thousands of rows is otherwise very hard to spot — everything looks fine to the naked eye until you know where to look.

> **Row numbers refer to rows in your uploaded file**, so open the original `.CSV` / `.XLSX` and count from the top. Remember that the header row occupies line 1 in most spreadsheet apps, so a reported row may sit one line lower than you expect.

Interrupted imports

If your import fails part-way through (for example, due to an Atlassian Forge service issue), don't worry — any records successfully processed before the error remain in your CRM.

> **Example:**
> If an import of 1 000 Leads stops at 200 records, those 200 are saved.
> You can upload the same file again and choose **"Add only new Records"** to continue the process and import the remaining 800 without duplicates.

The same error reporting applies to Contacts Import, Companies Import, and Products Import.

Notifications and Assignment

If imported Leads are assigned to another user, that user will automatically receive a notification, for example:

> *"Nataliia Timoshyna imported and assigned website_leads_november.csv to you."*

They can open the Leads directly from the notification and start working on them immediately.