



**Nextiva CRM  
Data Management**

VERSION 1.3

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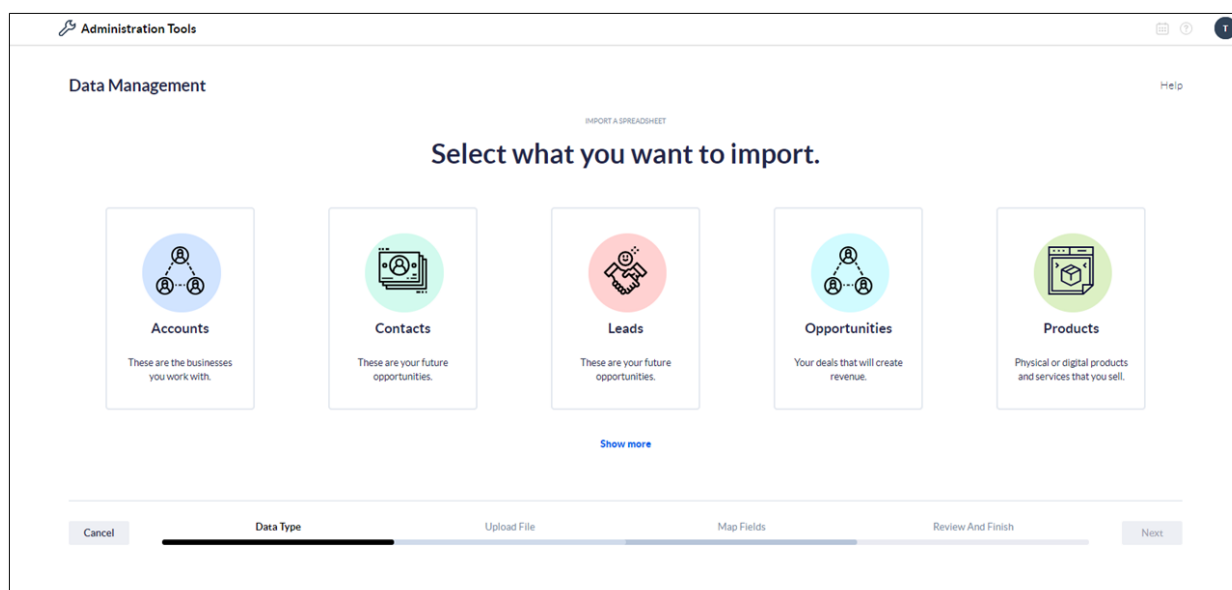
## Data Management

Save time and resources by eliminating the need to manage customer information in multiple applications by importing data to Nextiva CRM. No more switching between various programs to understand the customer journey. Nextiva CRM has made it easier than ever by providing all the necessary customer management tools in one place. Get started by importing your existing data, such as Contacts, Accounts, Leads, and Opportunities, for example. You can also integrate with QuickBooks to import existing customer information to Nextiva CRM.

### Importing Data

1. Visit [nextiva.com](https://nextiva.com), and click **Login** to log in to NextOS.
2. From the NextOS Home Page, select **CRM**.
3. Click the **Administration Tools** (wrench) icon at the top-right corner of the Nextiva CRM window.
4. Under **Advanced Settings** in the left navigation panel, select **Data Migration & Integration**.
5. On the Data Management page, click the **Spreadsheet** tile and select the record type (Accounts, Contacts, Cases, Leads, Opportunities, Products, or any custom record types) to import. Only one record type can be imported at once. Click **Next**.

**NOTE:** Click Show more to view all record types. If you do not see the record type to import, click the **Something else** tile and select **Go to Customize Database** to add the desired data.



### Data Type

6. Upload the data via a .csv file and click **Next**.

**TIP:** To ensure your data is imported successfully, check out our **Templates** for guidance.

7. Review the mapping for each field to ensure the data is imported and presented correctly in Nextiva CRM. Click **Next**.
  - a. Enter a name for the import.
  - b. Enter an optional description.
  - c. Review the columns on the .cvs file you uploaded.
  - d. Compare the available fields in Nextiva CRM to your fields. To edit the Nextiva field, click the drop-down, and select the desired field to display the data.
  - e. Select the **Unique Identifier** (**Account Number** or **Account ID** by default), or the field we look at while importing data to prevent duplicate imports.

## Map your fields

Map the fields from your file to NextOS fields.

**Import details**

Account Import A

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**Account**

File: 15862866509931622\_190301\_Accounts-Template (2).csv

**Your fields** C

- Account Number →
- Account Name →
- Industry →
- Phone →
- Email →
- Fax →
- Website →
- Description →

Briefly describe this import B

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**Nextiva fields** D

- Account Number
- Do not Import
- Account Name\*
- Account Number
- Account Value
- Billing Address City
- Billing Address Country
- Billing Address Postal Code
- Billing Address State
- Billing Address Street 1
- Website
- Description

**Unique Identifier** E

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### Import Mapping

8. Review the mapping and import details and click **Finish import**.

## Integrating QuickBooks

Nextiva CRM provides a one-way sync functionality from QuickBooks. Whenever customer information is added to, updated in, or deleted from QuickBooks, Nextiva CRM will automatically reflect the change. Administrators can customize the integration by associating the QuickBooks fields to the Nextiva CRM fields.

**NOTE:** This integration is only available for QuickBooks online edition (not the premise-based version).

1. Visit [nextiva.com](https://nextiva.com), and click **Login** to log in to NextOS.
2. From the NextOS Home Page, select **CRM**.
3. Click the **Administration Tools** (wrench) icon at the top-right corner of the Nextiva CRM window.
4. Under **Advanced Settings** in the left navigation panel, select **Data Migration & Integration**.
5. On the Data Management page, click the **QuickBooks** tile.
6. Click **Connect App** and sign into QuickBooks.
7. Map the QuickBooks fields to the NextOS fields for Contact and Account.
  - o Matching fields will pre-populate.
  - o Click **+ Additional Fields** to add QuickBooks fields.
8. Click **Save**. The QuickBooks tile will display a checkmark at the top-right corner to indicate the completion of the integration.

## Viewing Import History

During or after importing data to Nextiva CRM, you can see the current status, import details, and troubleshoot any errors that may have occurred during the import. You can also choose to Import or Export data at the top right-hand corner.

1. Click the **Administration Tools** (wrench) icon at the top-right corner of the Nextiva CRM window.
2. Under **Advanced Settings** in the left navigation panel, select **Data Migration & Integration**.
3. On the Data Management page, click **View Recent Imports**.
4. Click the **Actions** drop-down to view the import details or download the error file for the specified import.

Job Id	Description	Type	Created By	Date	Status	Actions
8319		Import	Taylor Brown	2020-04-06 18:16:38	In progress	Actions
8318		Import	Taylor Brown	2020-04-06 18:14:28	Complete	Actions Download error file View import details

*Import History*

## Exporting Data

Export data from Nextiva CRM to evaluate and compare to previous years. For example, you can export the total number of Accounts each quarter to compare to previous quarters to determine how many new accounts signed up.

1. Click the **Administration Tools** (wrench) icon at the top-right corner of the Nextiva CRM window.
2. Under **Advanced Settings** in the left navigation panel, select **Data Migration & Integration**.
3. On the Data Management page, click **View Recent Imports**, then **Export Data** at the top right-hand corner.
4. Enter a description describing the export, and then select the checkbox(es) next to the desired data to be exported.
5. Click **Save & Run**.

**NOTE:** The export will be available to download under the Import History page for up to seven days before it is automatically deleted from the system.