Check CRM Export Report - Errors

Follow these steps to access the CRM Export Report

1️⃣ Go to the **Activity** section ![]
(https://downloads.intercomcdn.com/i/o/qjmc10sy/1940998894/62f87c7efc05a883d154b4c68dd6/image.png?
expires=1770723000&signature=b9c666c264f2be40004bcd31039fd9de9625d0c6cb9a893f6ddae88e65804925&req=

2️⃣ Use the available filters:

- **Actions**: Select "Export companies to CRM" or "Export contacts to CRM".

![](https://downloads.intercomcdn.com/i/o/qjmc10sy/1941003490/dd5b718a4529f2210b7dc82833d1/image.png?
expires=1770723000&signature=7048d8859f637eb6d3abf6bc66d7de9ab510b0b998a4d95041133333e291ce43&req=d

- **All users**: You can choose which user performed the specific action.

- **Date**: Choose the date range you want to review (e.g., today, last week, last month, etc.).

![](https://downloads.intercomcdn.com/i/o/qjmc10sy/1413925296/e9542d2faf3f78407c4e0644033d/image.png?
expires=1770723000&signature=08c03d5464284368055b14d21e9120c2f4462722c3dfbb8f8d114d09e5099d14&req=d

![](https://downloads.intercomcdn.com/i/o/qjmc10sy/1413925447/560fdfe8b9d3d43d0d046c3a7e19/image.png?
expires=1770723000&signature=aef6867457df74f539626f24a1782ed671dfdbab689c9a3446ef8f74f46f063d&req=dSQ

After applying these filters, a list of all performed exports will be displayed clearly.

In this list, you can easily identify:

- **Who executed the export** (the name of the user who performed the action).

- The number of **companies/contacts** exported, and how long ago the export took place.

![](https://downloads.intercomcdn.com/i/o/qjmc10sy/1413925776/2e4b6823757baffd93ebdcce0b1c/image.png?
expires=1770723000&signature=39da6b325f516be20eab4f76d5415f2406eee15ad1739e0db87b1f29b52cee93&req=dS

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3️⃣ Click on the **sheet icon**.

![](https://downloads.intercomcdn.com/i/o/qjmc10sy/1413926337/6c5bbd9798b1592bace12e3c5b45/image.png?
expires=1770723000&signature=0efb283d8dcf897958043028105266fdd0fad12af303fd50368fface7f8ddb4f&req=dSQ

##

4️⃣ Click on the dropdown menu to view the detailed report for companies or contacts.

![](https://downloads.intercomcdn.com/i/o/qjmc10sy/1413926647/aa2b778278d6a23674c6f6ed45f7/image.png?
expires=1770723000&signature=f3f68879abae68c09f945a61d651934e61e68233262f637b5e9c5bd1cff660c8&req=dS

✅ **Created new contacts** Indicates that **1 new contact** was successfully created in the CRM.

✅ **Updated contacts that already existed in CRM** Shows that **634 existing contacts** were successfully updated in the CRM.

⚠️ **Found duplicate contacts** Appears because the system identified **2 duplicate contacts**.

⚠️ **Weren't able to associate company to contacts** Indicates the system couldn't associate a company with **10 contacts**, leaving these contacts without an assigned company.

⚠️ **Companies that have the same CRM ID** Shows that **8 companies** share the same CRM ID, potentially causing issues or confusion in the system.

❌ **Found companies with create conflicts** Informs you that conflicts were encountered when trying to create **10 companies**. This may be due to data errors or duplicate records.

Hover over the emoji next to each category to:

- **Open the table**:

This lets you view the data table.

- **Open the CRM**:

Click to access the records directly in the CRM.

If you hover over the action icon next to each category:

![](https://downloads.intercomcdn.com/i/o/qjmc10sy/1413899643/38516d03a478c867ed163b5f7795/image.png?expires=1770723000&signature=3606f00c6555ff577baae1bb997ede533d321c499bed25cbf48c9068192c8768&req=dS

Open the table: This lets you view the data table.

![](https://downloads.intercomcdn.com/i/o/qjmc10sy/1413912835/c6aeb435edc4484b05f42a642ac3/Captura-2Bde-2Bpantalla-2B2024-11-25-2Ba-2Blas-2B10$27$39.png?expires=1770723000&signature=a5b164b98ce02b36826608587d7eb61764b41d2015dfc6035911c705e675f926&req=dS

Open the CRM

-Click to directly access the records in the CRM