

Check CSV Import Report

Use the CSV Import Report to quickly verify what was imported from a CSV file, who did it, when it happened, and whether there were any issues during the import.

This is especially useful if you need to:

- Confirm that an import completed correctly.
- Check how many companies or contacts were created.
- See if any rows failed or generated warnings.
- Audit who performed a specific import and on which date.

Steps to access the CSV Import Report

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1 Open the Activity section

- Log in to Genesy.
- Go to the **Activity** section.
- Here you will see a history of all actions performed in your workspace, including CSV imports.

2 Use the available filters To focus only on CSV imports, use the filters at the top of the Activity view:

- **All actions**
- Select “**Import companies from CSV**” or “**Import contacts from CSV**”, depending on what you want to review.
- **All users**
- Choose a specific user to see only the imports performed by that person, or keep “All users” to see imports from everyone.
- **Date**
- Select the desired date range (for example, **Today**, **Last week**, **Last month**, or a custom range).

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

In this list, you'll clearly see:

- **Who** performed the import (user's name).
- **How many companies/contacts** were imported and **when** the import was performed.

3 Review the list of imports

In the filtered list you will clearly see, for each import:

- **Who** performed the import (user name).
- **What** was imported (companies or contacts).
- **How many** records were imported.
- **When** the import was performed (date and time).

If there were issues during the import, the row will also indicate that the import includes **errors or warnings**, so you know at a glance which imports require attention.

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- This opens the detailed **CSV Import Report** for that specific import.

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This helps you immediately understand if the import went smoothly or if there is something to fix.

What information you get from the CSV Import Report

By following the steps above, you will know:

- **What** was imported: companies or contacts, and how many.
- **Who** performed the import: the user associated with the action.
- **When** it happened: date and time of the import.
- **Which records** were created: list of imported companies or contacts.
- **Whether there were issues:**
 - If the import includes errors or warnings.
 - For problematic rows, what kind of issue occurred (for example, invalid values or missing required fields), when this information is available in the report.

This makes it easy to audit imports, troubleshoot issues, and keep your data under control.

Now you have all the key information: what was imported, who performed the action, and when it was done.