



GETTING SET UP

Import your contacts with ReRoot

Bring your contacts and companies into RepBud — drop your export, and Ray reads it, maps the columns and files everything for you to check.

Covers /reroot (done screen links onward to /contacts) · for rep, dmc

The steps

01 Open ReRoot

From The Ridge, open ReRoot to bring an export into RepBud. The header reads RepBud ReRoot.

02 Drop your files

Drop a CSV or Excel export onto the zone — Ray reads the supported systems and any plain CSV.

03 Ray reads them

RepBud Ray opens each file, finds the real table and works out what's inside.

04 See Ray's read

Ray sums up what it found: the source, the row and company counts, and how the two files connect.

05 Check the mapping

Each column is mapped to a RepBud field. Skim it, and change anything Ray was unsure about.

06 Start the import

Happy with it? Confirm — Ray keeps working even if you close the tab.

07 Watch it land

Ray creates the companies first, then links the contacts, with a live count per file.

08 Done — go to contacts

When it finishes you get the totals. Open your contacts to see them in place.

Next: Your contacts CRM

Questions

What files can I import with ReRoot?

CSV and Excel exports right now — from TourPlan, Tourwriter, Wetu, HubSpot, Salesforce, Pipedrive, Google Contacts, Outlook and most plain spreadsheets. Ray finds the real table even when the export has a title block or subtotal rows above it. PDFs and Word docs join a waitlist for RepBud Archive.

Will Ray map my columns correctly?

Ray proposes a mapping for each column and marks anything it's unsure about, so you review and adjust before importing — it's there to assist your judgement, not replace it.

Do I have to wait with the tab open?

No. Once you confirm, Ray keeps working in the background and emails you when it's finished — you can close the tab and carry on.

Can I see what I imported before, or import more than one file?

Yes — drop several files in one go, and use See past imports (</reroot/history>) to review earlier batches and their counts.