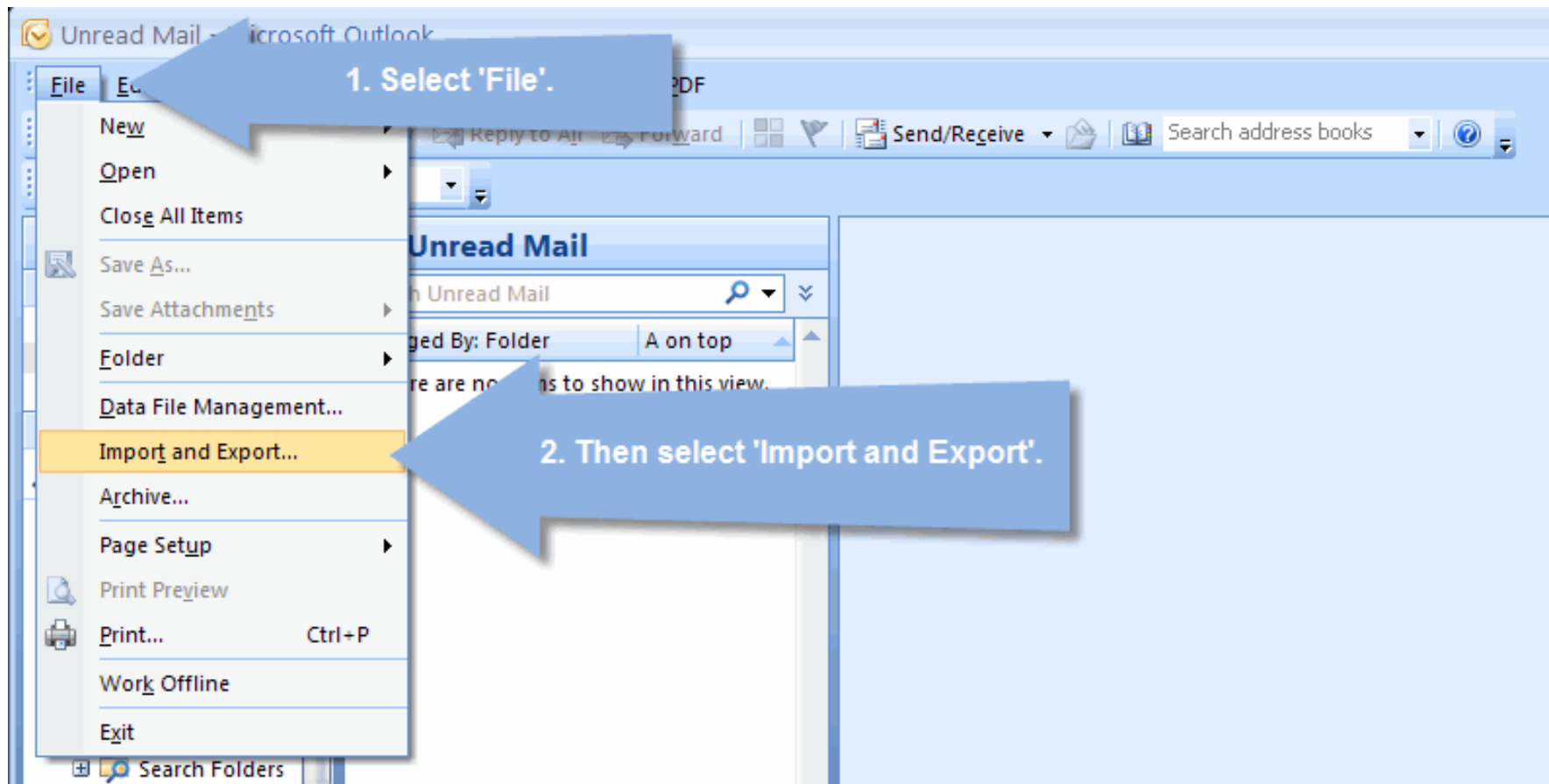
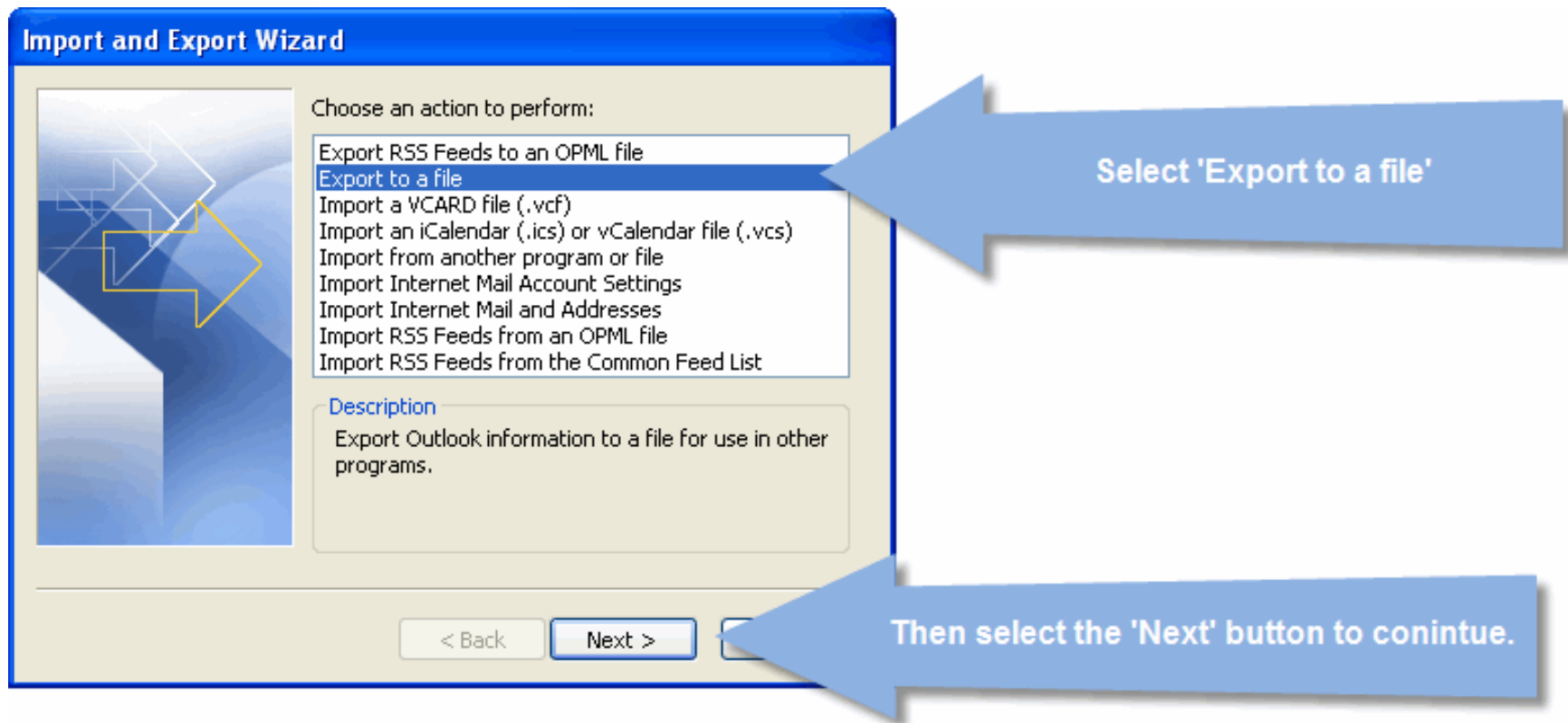


Learn how to export your contacts from Microsoft Outlook, and import them into the Customer Relationship Management application.



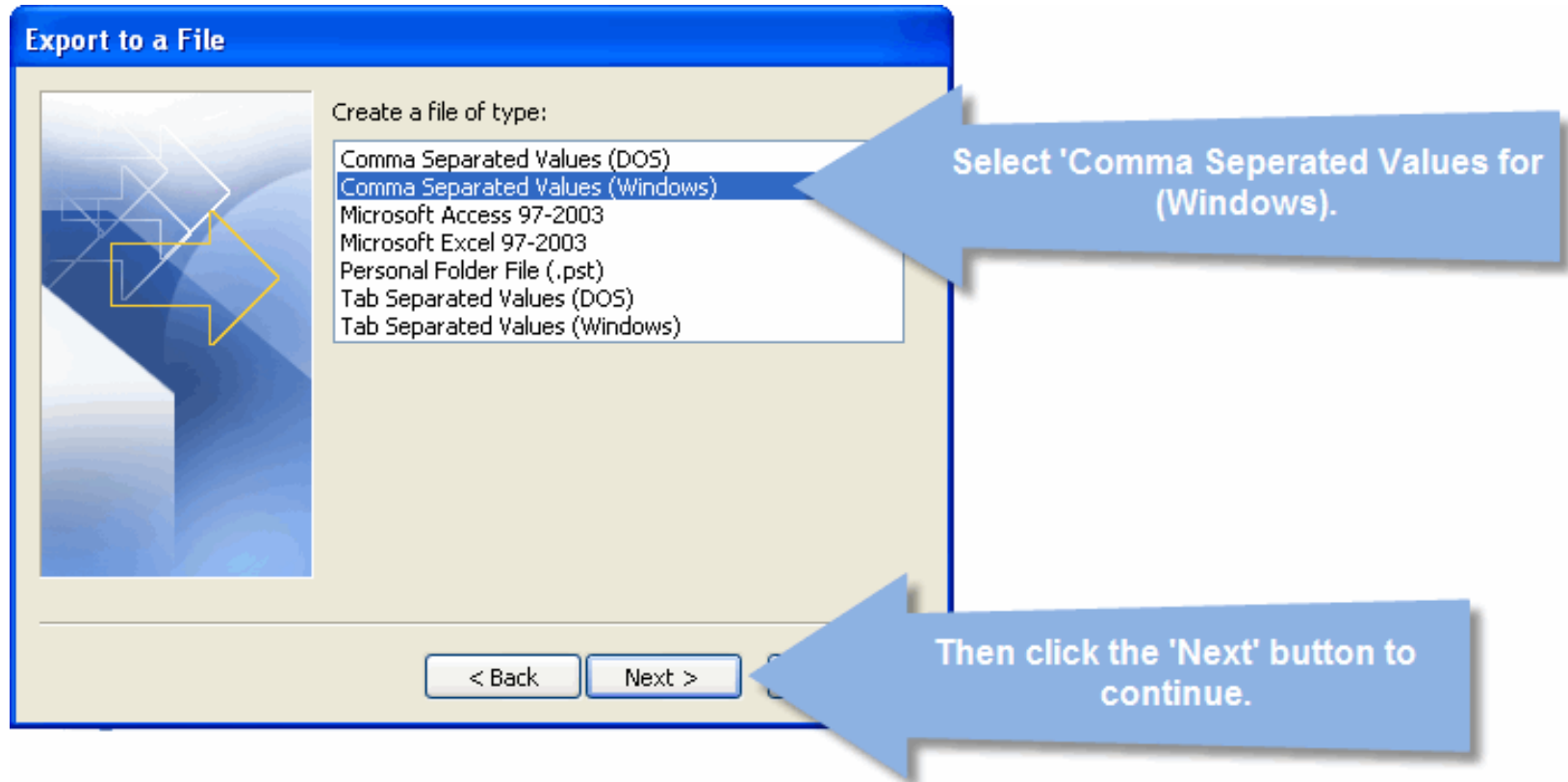
1. First, to export your contacts from Outlook, open up Microsoft® Outlook and select 'File'.

1. Then select 'Import and Export'.



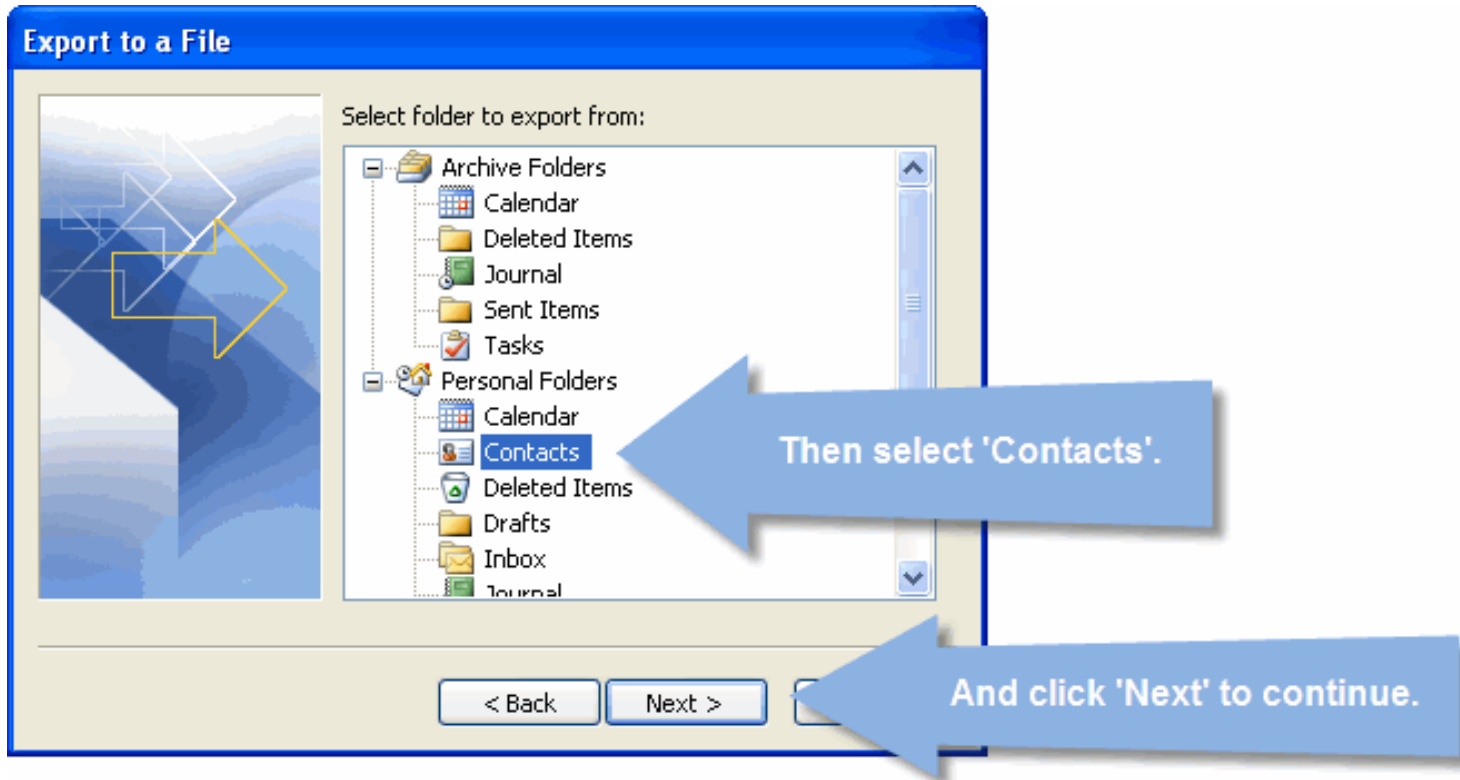
The window displayed will then appear.

Be sure to select 'Export to a file', and click 'Next' to continue.

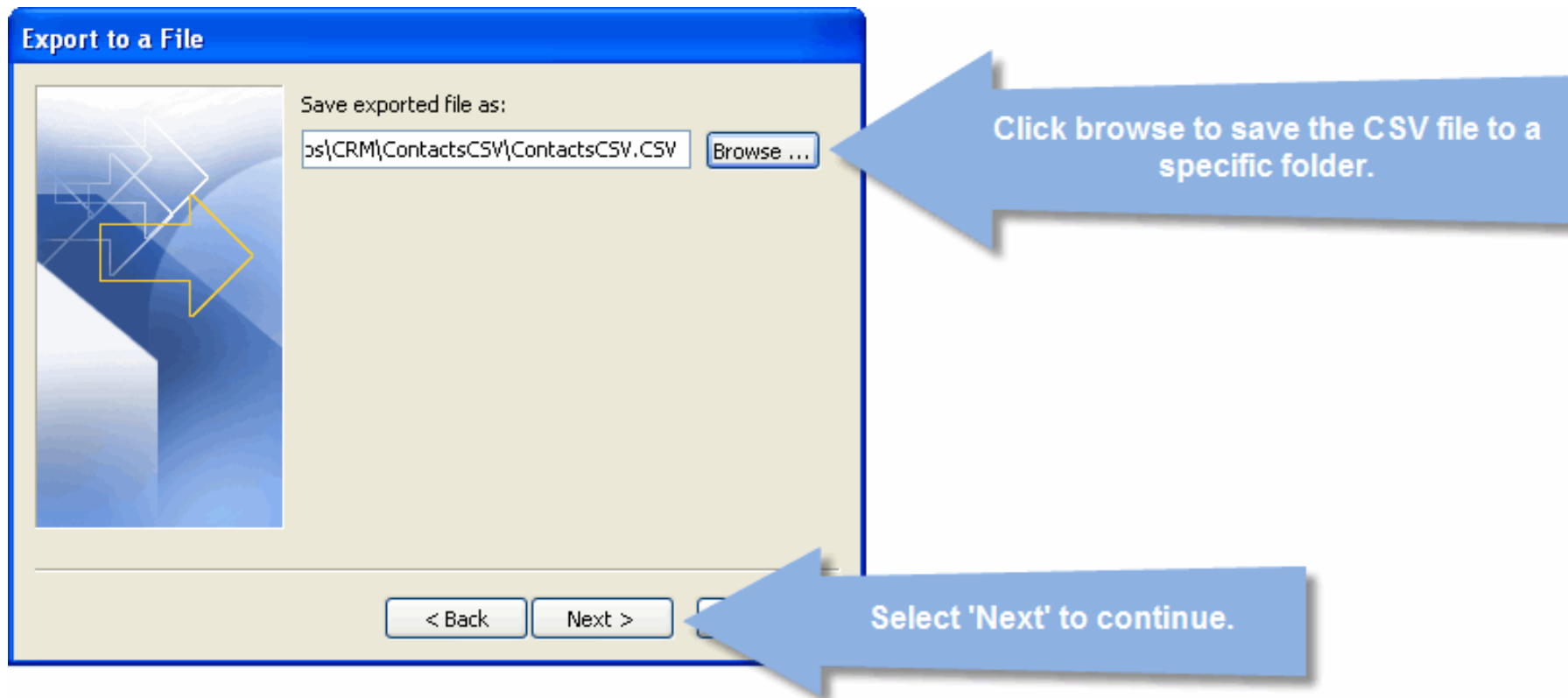


Then select 'Comma Separated Values' for Windows.

Comma separated values are also known as a CSV file, which is the file format used to import information into the CRM application.

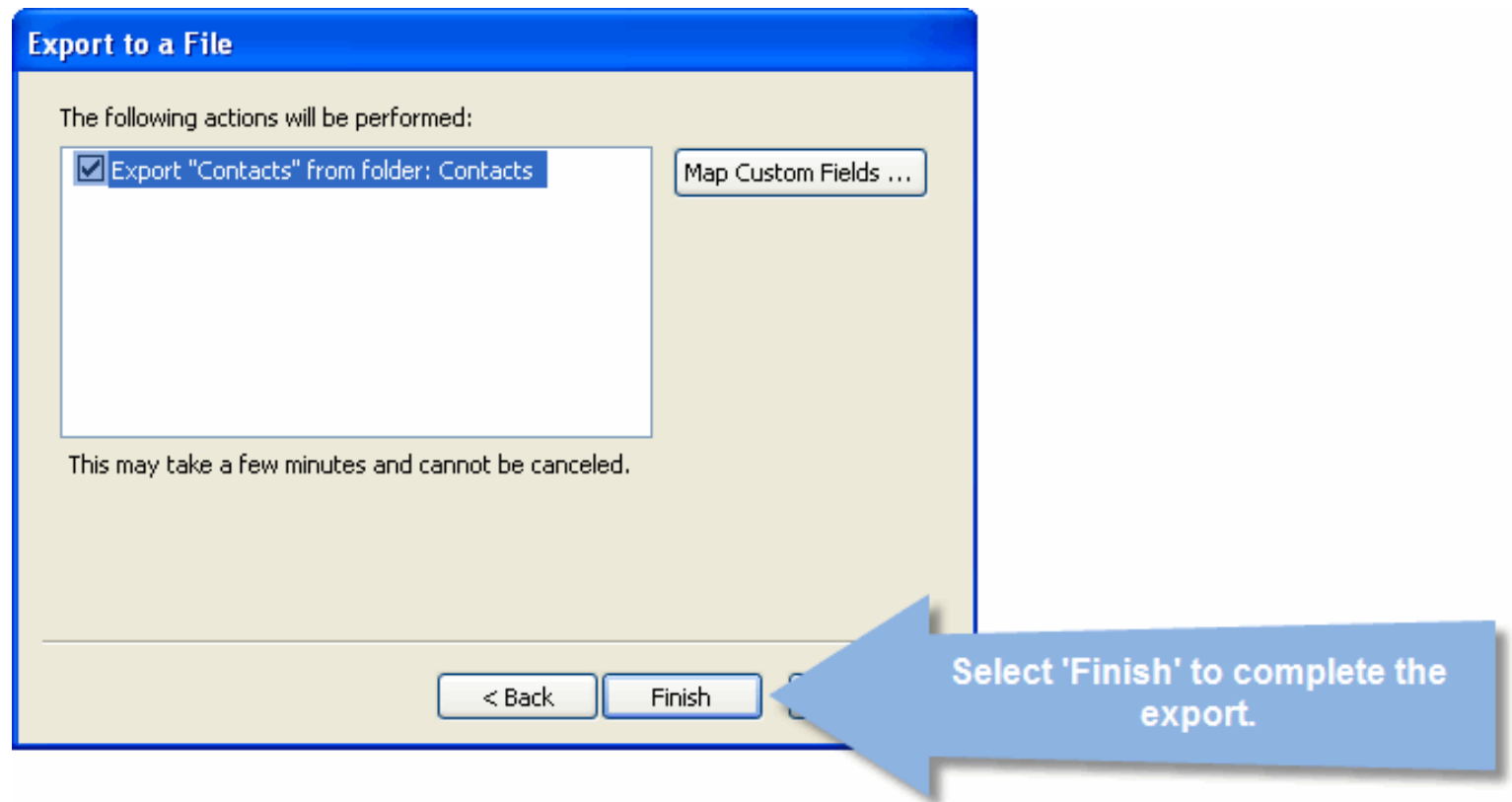


In the next window select contacts from the expanded folders, and click next to continue.

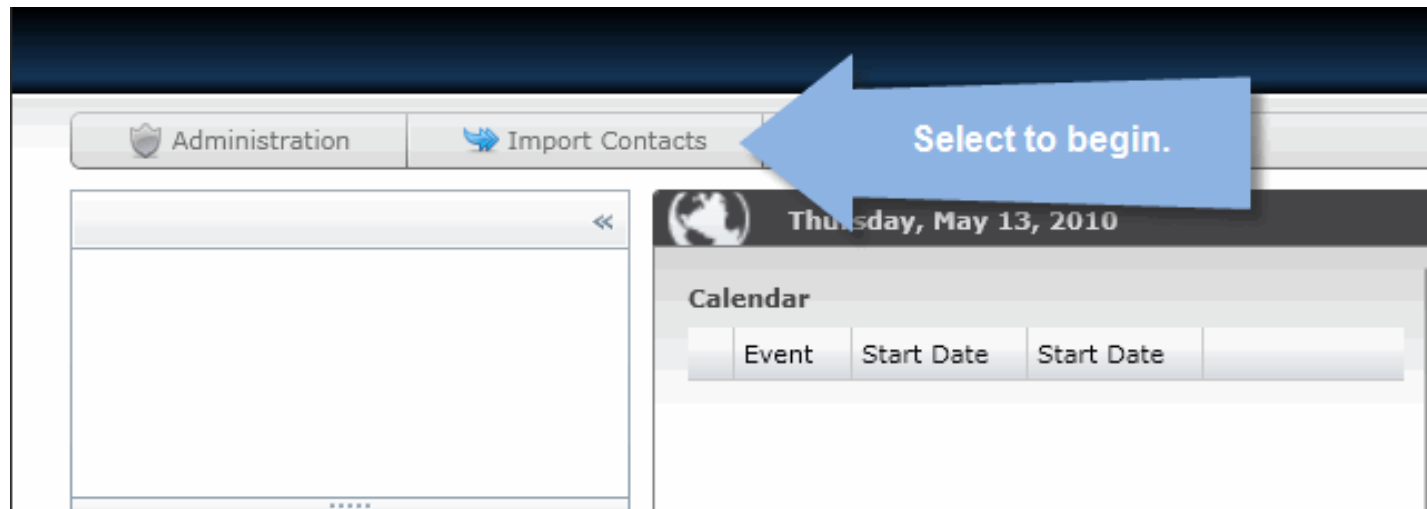


In this window select the browse option to save the CSV file to a specific folder so that you can easily locate it.

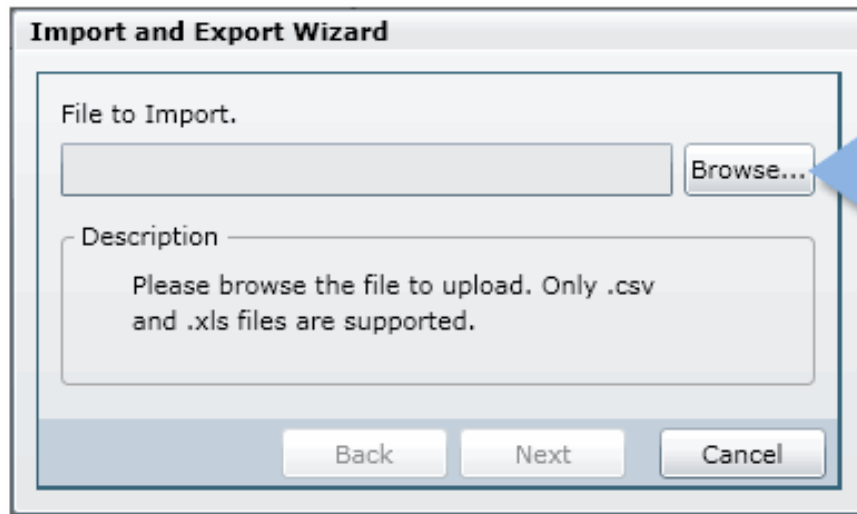
Then select 'Next' to continue the process.



Then click 'Finish' to complete the export.

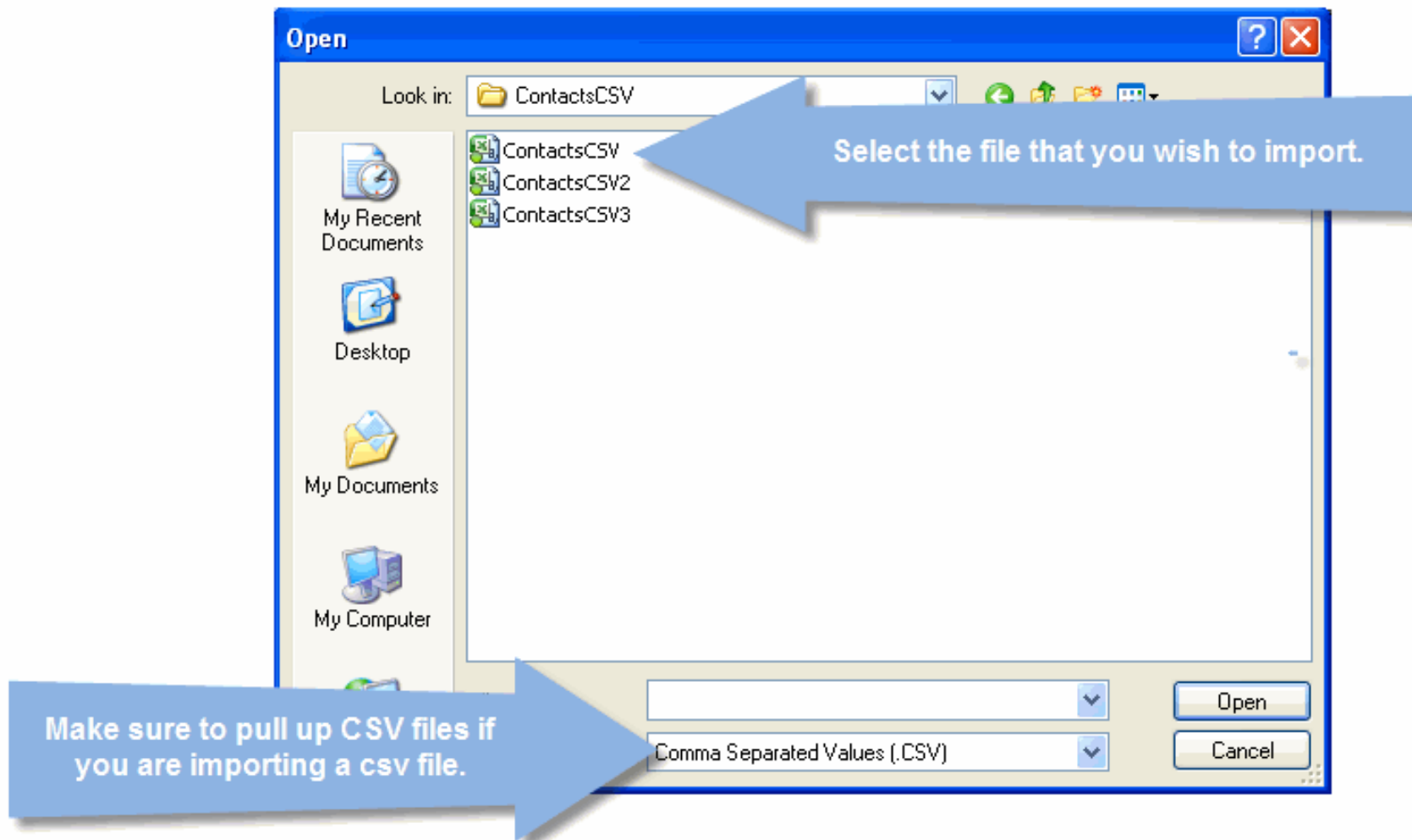


To begin the import process into your Customer Relationship Management application, select the 'Import and Export' option from the 'Admin' tab.

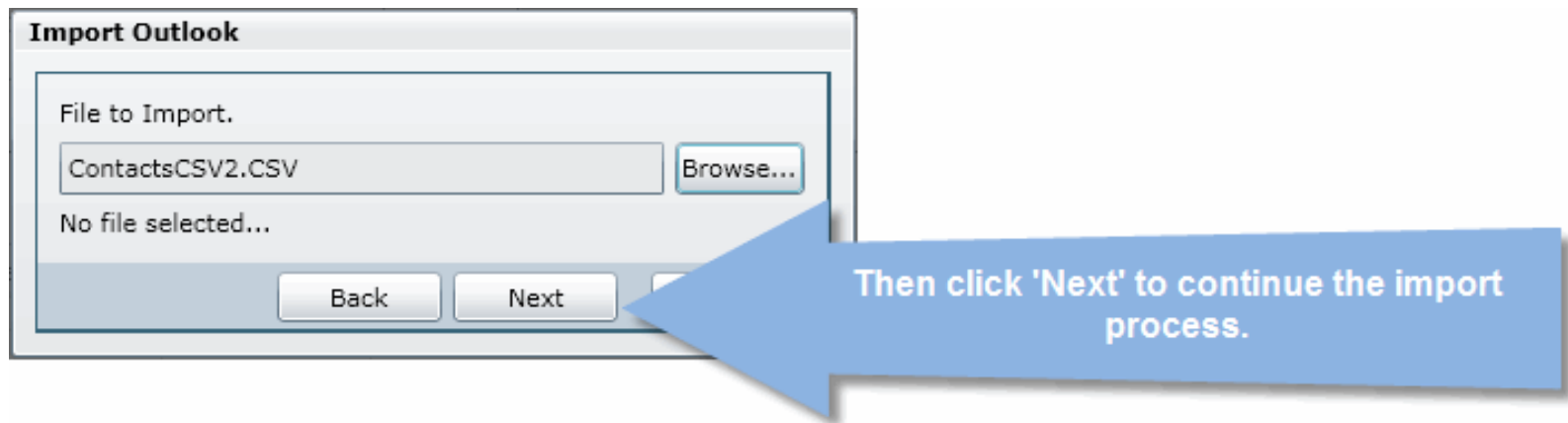


Select 'Browse' to find the file you wish to import.

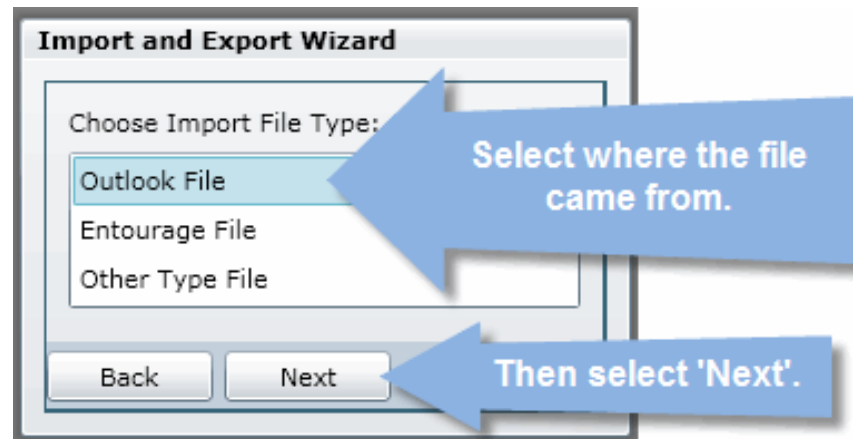
Then click browse to select the specific CSV file you wish to import.



Select the file that you wish to import. Be sure to select the type of file so that you are able to view it when selecting.



Then click 'Next' to continue the import process.



-Select where the file came from.

-Then select 'Next' to continue.

Import and Export Wizard

Source columns are list of fields in the imported file.
 CRM columns are list of Contact fields in the CRM.
 Any text in Fixed Values will override the value in the selected field in Source Columns during importing process.

Source Columns	CRM Columns	Fixed Values
Anniversary	Anniversary	
	FirstName	
	LastName	
	Fax	
Business Phone	BusinessPhone1	
Business Phone 2	BusinessPhone2	
Company	CompanyName	
Email Address	EmailAddress	

Back Next Cancel

Makre sure your source matches up with your CRM columns so that no informatin is lost.

Add a fixed value if you want to name a specific field something else.

Here you have your Source and CRM columns where you can match your list of fields to make sure they are imported properly into the CRM.

Source Columns: Are the list of fields in your csv or excel file. Ex. Mobile Phone, First Name, Last Name, etc.

CRM Columns: These are the fields in the CRM. Your source Columns should match up with your CRM columns to ensure the import is successful.

Fixed Values: A fixed value will override the source column by entering the value specified across all records in that column.

Import and Export Wizard

Define the values for fields that are not specified in the provided document.

Define Field Values

Contact Type: Leads

Account Executive: Jake Doe

Source: Cold Call

Group:

- Group Name 1
- Group Name 2
- Group Name 3

Back Next Cancel

1. Select the contact type you wish to import this set of contacts as.

2. If necessary, select an employee or sales agent that these contacts are related to.

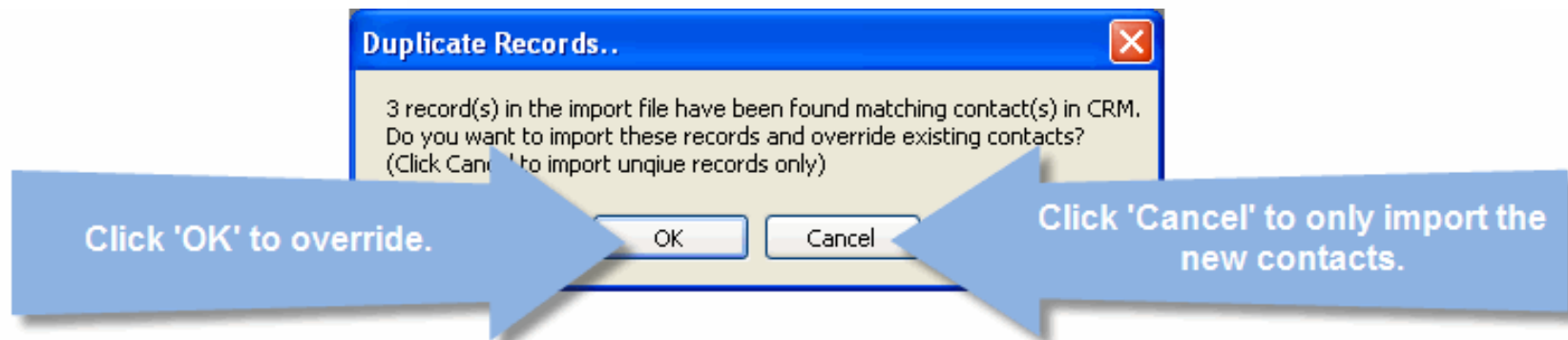
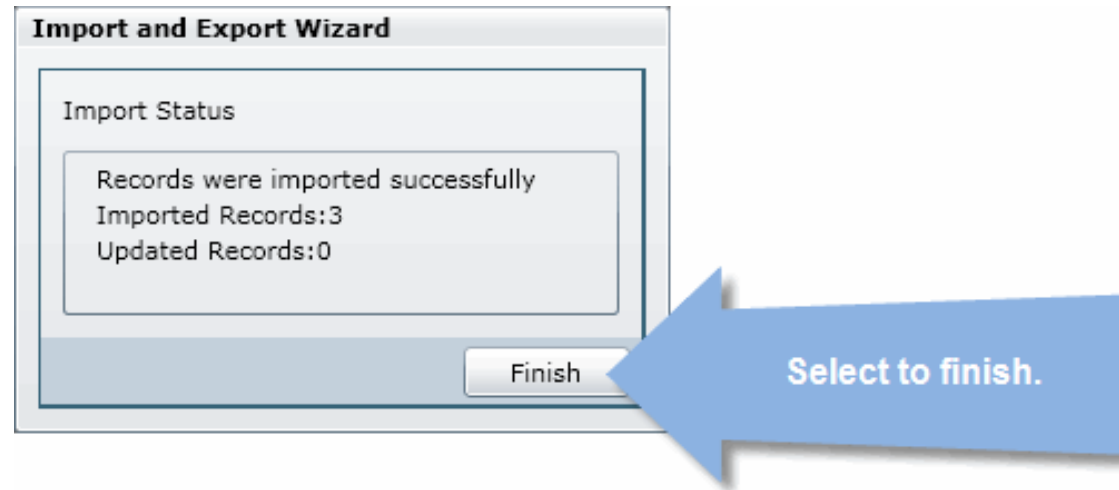
3. You may also name the source of how these contacts or leads were obtained for organization purposes.

4. If necessary, select a group name that you have created in the CRM that you would like this set of contacts to be apart of.

5. Then select 'Next' to continue.



This window will then appear. Be sure to click 'Start Import' to begin the import process.



If you receive the pop-up above then you have duplicate contacts that you are trying to import.

-If you select 'OK' then the duplicate contacts will be replaced with the contacts being imported.

-If you select 'Cancel', only your new contacts will import, and not the duplicates.

Administration Import Contacts

Contacts

- All Contacts
- Advisors
- Competitors
- Customer

Dashboard

Calendar

Tasks

Contacts

+ Add New Search Action Multi-Edit Form Grid Columns Total Records: 1083

	First Name	Last Name	Company Name	Contact Type	Business Phone	Mobile Phone	eMail Address
<input type="checkbox"/>	Betty	Smith110	Smith Company	Vendor	4.04256E+12		bsmith@smithco110.com
<input type="checkbox"/>	Betty	Smith111	Smith Company	Vendor	4.04256E+12		bsmith@smithco111.com
<input type="checkbox"/>	Betty	Smith112	Smith Company	Vendor			
<input type="checkbox"/>	Betty	Smith113	Smith Company	Vendor			
<input type="checkbox"/>	Betty	Smith114	Smith Company	Vendor			
<input type="checkbox"/>	Betty	Smith115	Smith Company	Vendor	4.04256E+12		bsmith@smithco115.com
<input type="checkbox"/>	Betty	Smith116	Smith Company	Vendor	4.04256E+12		bsmith@smithco116.com
<input type="checkbox"/>	Betty	Smith117	Smith Company	Vendor	4.04256E+12		bsmith@smithco117.com
<input type="checkbox"/>	Betty	Smith118	Smith Company	Vendor	4.04256E+12		bsmith@smithco118.com

Your newly imported contacts will then appear in your contact list.

Your contacts will then appear in your 'Contact' list, under the 'Contacts' tab.