Importing Contacts

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HOW TO IMPORT AN EXCEL FILE INTO YOUR SALESNEXUS DATABASE

1) Open Excel file.

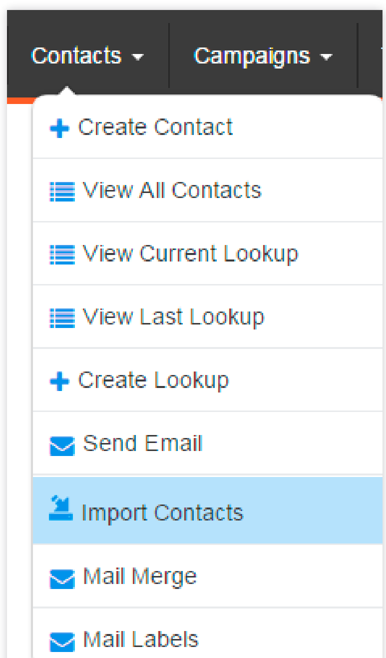
2) Make sure there is NO formatting on the file

   (no bold text, no lines—underlines or borders, no freeze frame and tab names should be "sheet1, sheet2, etc.)

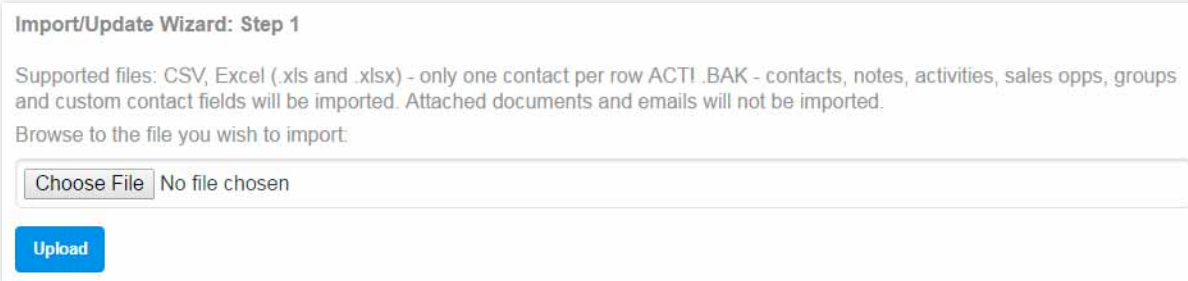
   **Fastest way to save without formatting is to click top left corner of sheet to high-light all, copy and then paste as value only into a new excel document.

3) Save file with no formatting as an XLS or XLSX file.

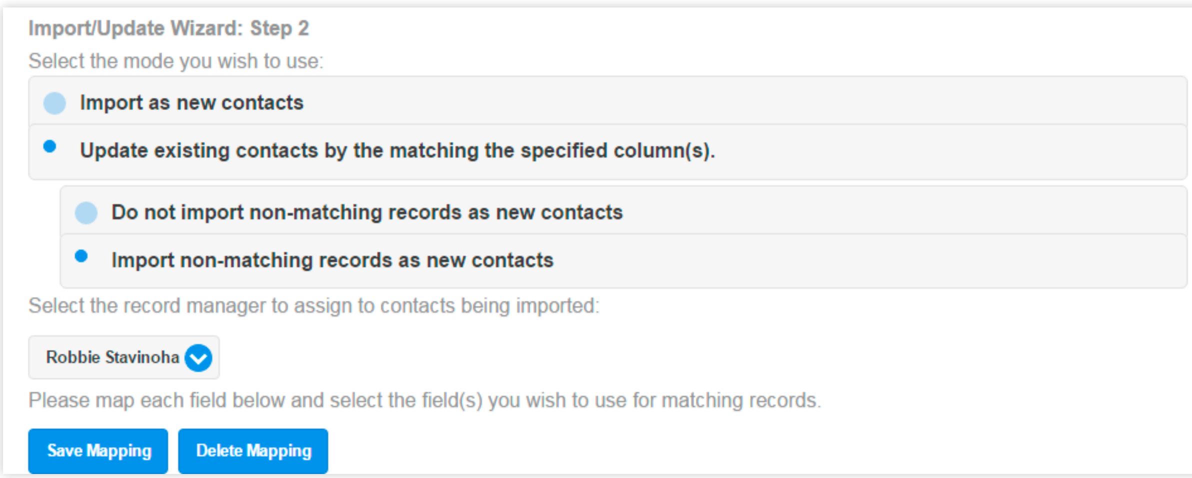
4) In your database, Go to Contacts >Import Contacts



5) Select the file you wish to upload



6) Once you select Upload, the mapping fields will pop up in a new window:



Pick the second radio button down—**Update existing contacts by the matching the specified column(s).**

Then the second radio button one under that one—**Import non-matching records as new contacts.**

Change the Record manger drop down to another record manager if you need to.

7) Select Save Mapping

8) The CSV Header shows you the field names from your excel file, the Contact Field column show you the choices from your database. Select for Matching is what you chose to match contacts by to prevent duplicates. Select for Updating allows you to pick the fields you want to update on an existing record.

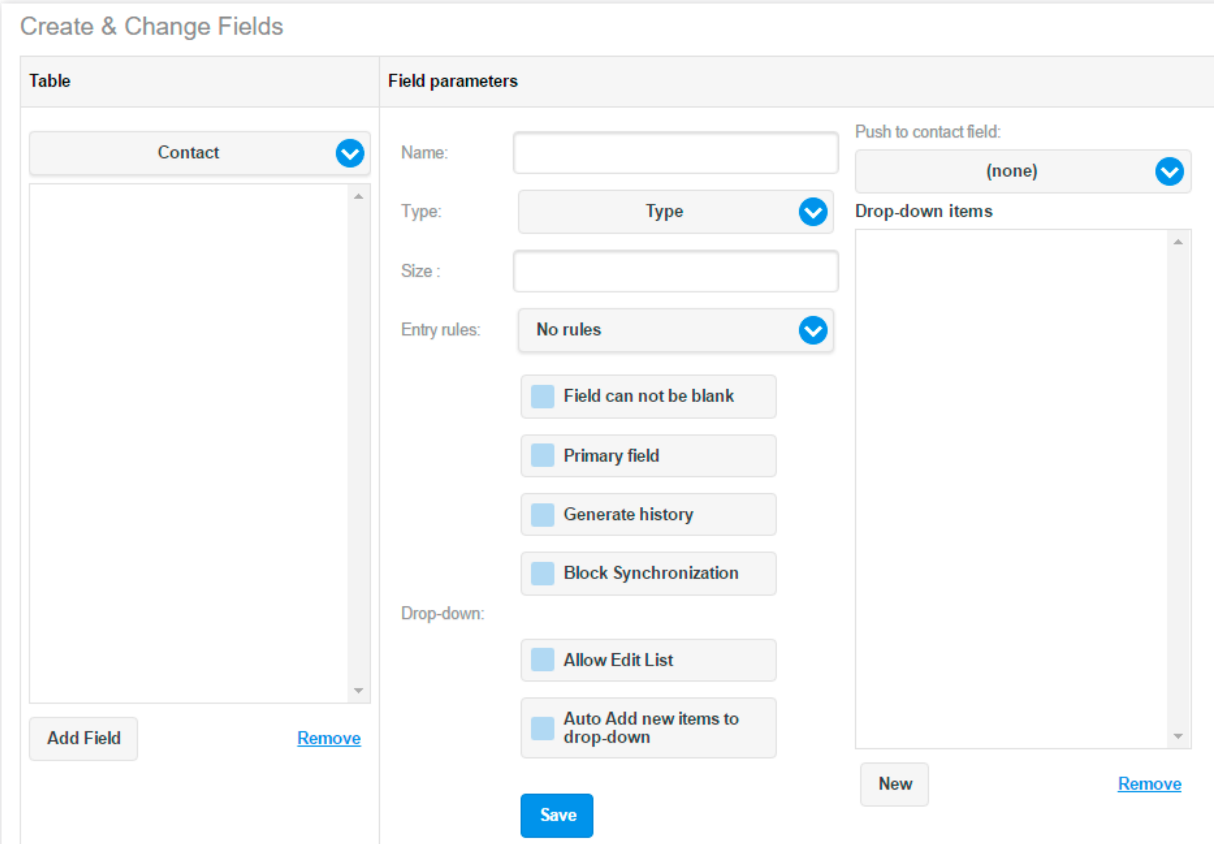
CSV Header	Contact Field	Select For Matching	Select for Updating
F1	-- No mapping --		
F2	-- No mapping --		
F3	-- No mapping --		
F4	-- No mapping --		
F5	-- No mapping --		
F6	-- No mapping --		
F7	-- No mapping --		
F8	-- No mapping --		
F9	-- No mapping --		
F10	-- No mapping --		

9) Then in the Contact field box choose the field in the database that you want the data in the **CSV Header** field brought into. The **Contact Field** column uses the drop down menu to allow you to pick the field in the Contact table that you want to put the information in. The CSV Header field name does not need to match the Contact Field name. All fields will start with No Mapping. This allows you to decide not to bring a field in as well. e.g. Company under CSV Header is then mapped to the Company field in the Contact Field column next to it so that the data is imported to the company field.

If a field is not in the drop down menu to the corresponding CSV Header line you can Map it to fields not assigned in the mapping list. These Fields are there in case you forget to create your fields first.

If you want to create the fields first or need to rename one of the fields you used on your import, follow the next steps outline:

10) Go to System Settings > Create and change Fields.



11) Add your new fields or select existing fields to edit/update

12) Once complete, SAVE