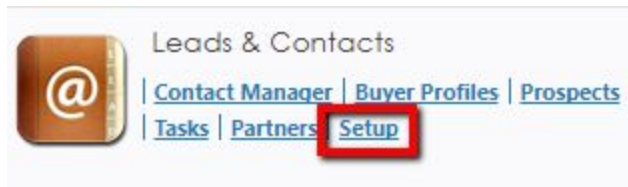




Importing Contacts



Importing Contacts



Importing Contacts will be one of the first and most important things to do especially if you already have a large contact database.

The file types are:

- Microsoft Outlook (version 2000, 2002, 2003, Express, and XP)
- Top Producer
- "Generic" can be selected to use a CSV (comma separated values) spreadsheet. See end of article for formatted columns: **A Generic CSV file with all the necessary fields is available within your Power Suite.**

Leads & Contacts

Easily follow up on new leads, keep track of your contacts, identify buyer preferences and match them with listings.

Contact Manager

Buyer Profiles

Prospects

Tasks

Partners

Setup

Advanced Settings



Importing Contacts

Import Contacts

Do you have a list of contacts in another system or an out of control spreadsheet of contacts? Import them all at once and use the Homes.com Contact Manager to easily add them to a Drip Email Campaign and monitor all their activity.

1. Format your spreadsheet using this [Sample CSV File](#)

2. Select the file type:

3. Then select the formatted file you want to import:

Choose File

4. If you would like to categorize these contacts, please select one or more categories below. This is not required to import your contacts:

- | | | | |
|--|---|---|--|
| <input type="checkbox"/> Attorney | <input type="checkbox"/> Broker/Realtor | <input type="checkbox"/> Buyer | <input type="checkbox"/> Buyer/Seller |
| <input type="checkbox"/> Closing Agent | <input type="checkbox"/> Employee | <input type="checkbox"/> Home Inspector | <input type="checkbox"/> Internal User |
| <input type="checkbox"/> Landlord | <input type="checkbox"/> Lender | <input type="checkbox"/> Other | <input type="checkbox"/> Seller |
| <input type="checkbox"/> Sellstate | <input type="checkbox"/> Tenant | <input type="checkbox"/> Tim Brown | <input type="checkbox"/> Tim Brown 2 |
| <input type="checkbox"/> Title Agent | <input type="checkbox"/> Unknown | <input type="checkbox"/> Webinar | |

5. If you would like to indicate the source of these Contacts, please select from the pick-list below. This is not required to import your contacts:

6. If you have completed steps 1-3, you can import your file any time by clicking the Import button:

Import

****Note: Leads Without First Name Or Email Address fields cannot be imported, all contacts beneath them in the spreadsheet will not import either.****

If you have the file saved to your computer and in the correct format, select the Choose File option, and import the CSV file needed.

After the file has imported, you should see a message of the number of contacts correctly imported into Power Suite.

If there are contacts that did not import correctly, take a look at your CSV and make sure that everything is in the correct column.

Importing Contacts

The imported contact forms must fit the Outlook CSV format in which the columns are ordered as follows:

A. Title	B. First Name	C. Last Name	D. Address
E. City	F. County	G. State	H. Zip
I. Country	J. Email Address	K. Home Phone	L. Cell Phone
M. Business Phone	N. Fax	O. Company	P. Notes
Q. WebURL			
