

Before You Begin: About Campaigns

When using the Import Wizard, all records in the file being imported are loaded into the same campaign. As described below, you may choose to import the records into an existing campaign or create a new campaign during the import process. If you have a file with records that need to be assigned to a number of different campaigns, save the records in separate files according to campaign and then proceed with the Import Wizard for each file.

Before You Begin: Exporting Selected Records

By default, the process outlined below will export all of your Outlook contacts into a single export file that can then be imported into LeadMaster. If you do not wish to export all of your Outlook contacts into LeadMaster, you can copy the selected contacts you wish to export into a separate folder before proceeding with export. To do so, follow these steps:

1. Create a sub-folder by right clicking on Contacts in the Outlook folder list and selecting **New Folder** from the menu.
2. Enter a name for this folder such as “Contacts to Export” and then click **OK**.
3. To move a contact into this folder, open the contact and choose **File>Copy to Folder**. Highlight the sub-folder you created from the folder list and click **OK**.
4. Repeat for all contacts you wish to add to the selected records export.
5. After you complete the export and import process, you may wish to delete these “copied” contacts from the sub-folder or delete the entire sub-folder. In this way, you can start with a “clean” slate if you wish to export new records added to Outlook using the selected records export method.

Preparing the Export File

1. Launch Microsoft Outlook and choose **File>Import and Export**.
2. Select **Export to a File**. Click **Next**.
3. Select **Comma Separated Values (Windows)**. Click **Next**.
4. Highlight the **Contacts** folder or another folder containing contacts (such as a sub-folder with selected contacts as described above). Click **Next**.
5. Enter a **file name** for the export file and/or browse your computer or network to save in a particular directory. Click **Next**.
6. Click **Finish**. This will complete the creation of the .csv export file, which can now be imported into LeadMaster.

Importing the Outlook File Into LeadMaster

1. To import records into the database using the Import Wizard, click on **Add New Records** at the top of any page. Select **Import Records to Database** from the menu.
2. Follow the **Import Wizard** to select the appropriate database and then browse for the data file you wish to import. Click **Next** after each step. In the template step, select **New Template** from the User Template selection box and click **Next**. In the next step of the wizard, select the appropriate campaign or create a new campaign and click **Next**. Then indicate whether your import file has a header file; if you followed the steps above to create an export file directly from Outlook, choose **Yes** and click **Next**.

3. Map the fields from the import file (Outlook) to the system fields (LeadMaster). To map the fields, click on a field name from your import file in the first column and then click on the corresponding system field name in the second column. Then click on the right arrow to move the matched fields into the far right column. Repeat the step with each additional field. If you make a mistake or wish to remove a matched pair from the far right column, simply click on it to select it and then click on the left arrow. Note that the fields available for download matching are defined by your Administrator. If a field you would like to use in your file import is not displayed in the list of available system fields, please contact your Administrator to discuss your requirements. When all fields you wish to import have been matched, click **Next**.
4. In the Custom Form step of the Import Wizard, select **Not Loading to Flex Form** and click **Next**.
5. In the next step of the Import Wizard, the Import Wizard will prompt you to assign the records. If you do not wish to assign the records to one or both levels, simply select **Do Not Assign** and click **Next** to skip this step and continue. If you wish to assign records, select the assignment choice(s) from one or both of the drop-down boxes and then click **Next**.
6. If you plan to use this template to import additional export files from Outlook in the future, click on **Save Template**, then enter the template name and description in the pop-up window and press **Submit**.
7. Review the import summary, noting in particular that the filename is the file you intended to import and that the number of records matched the number in your original file (not counting the header row). Any discrepancy in the number of records may indicate an error in the import process, usually encountered due to inconsistencies in the import file. Once you have reviewed the import summary, click **Finish** to load the records into your database. A window will appear showing the progress of the load. Please wait until the load process finishes, indicated by the display of the Import Loads list summarizing current and previous imports. A red text message at the top of the screen will provide final confirmation of the load, including number of records and filename.