CompuLEAD Data Import Instructions: Outlook

Contacts

Sel Contacts

Address Cards

O Phone List

O By Category

O Detailed Address Card

Current View

🔿 Mail

🔲 Calendar

S Contacts

My Contacts

Contacts - Microsoft Outlook

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Contacts Acc - Ans 🖭

am@compu

genea@co

nancv.addi:

drewa@eis

florana@o

frank

AccountManagers*

Aceron, Gene

Addison, Nancy

Amwoza, Drew

Angeles, Floran

Anselmo, Frank

E-mail:

E-mail:

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To import MS Outlook your data must be in Excel .csv format. Click here to convert to .csv

Start Outlook

Click Contacts

Click File **Click New Click Folder**



Create New Folder 🛛 🗙
Name:
Sales Contact
Folder contains:
Contact Items
Select where to place the folder:
🖃 🧐 Personal Folders 🛛 🔼
Calendar
See Contacts
🔄 Deleted Items 👘 📄
🖉 Drafts
📮 File
🔤 Inbox 👘 👘
Journal 🖉
🧓 Junk E-mail
Notoc 💟
OK Cancel

Type the Name: of your new file

Click OK

Click File

Click Import and Export

© S	ales Contact - Mic	rosoft Outlook	×
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	Eolder •	Double-click here to create a new Contact.	cd
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Click in Look in: field to locate your .csv format file.

Select one of the duplicates Options listed

Browse									?×
Look in:	🛅 Home				- 过 🔇	X 🝟	💷 🕶 To	ols +	
My Recent Documents	<mark>≇)</mark> 000999A()1q_XYZ_	_COMPAN`	(_A_READ)	(.CSV				
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My Documents									
My Computer									
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My Network Places	Files of <u>t</u> ype:	Comma Se	eparated Valu	Jes (DOS) (*.	CSV)		*	Ca	incel

Import a File	Eile to import: C:\Home\000999A01q_XYZ_COMPANY Browse Options Replace duplicates with items imported Allow duplicates to be created Do not import duplicate items
	< Back Next > Cancel

Click Next >



Click the new folder Sales Contact

Click Next >

Import a File	
The following actions will be performed:	Map Custom Fields
This may take a few minutes and cannot be canceled.	Finish Cancel

Click Map Customer Fields

Click on + sign to populate the name field

Map Custom Fields	×						
Drag the values from the source file on the left, and drop them on the appropriate destination field on the right. Drag the item from the right to the left to remove it from the field mapping.							
From: Comma Separated Values (DOS) 000999A01q_XYZCOMPANY_A_READY.csv	To: Microsoft Office Outlook Sales Contact						
Value	Field Mapped from						
Booth Number Show Name First Name Last Name Title Company 1 Address 1 Number	Vame Company Department Job Title Business Address Home Address Other Address Other Address						
< <u>Previous</u> <u>N</u> ext >	Clear Map Default Map OK Cancel						

From: Comma Separated Values (DOS) 000999A01q_XYZCOMPANY_A_RE	EADY.csv	To: Microsoft Office Outle Sales Contact	ook
Value	~	Field	Mapped from
Booth Number Show Name First Name Last Name Title Company 1 Address 1 Number		Name Title First Name Middle Name Last Name Suffix Company	First Name
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Click OK when done

Drag all values of your choice from From: column

to To: column

ne following actions will be perf	ormed:	
✓ Import "000999A01q_XYZ_	_COMPANY_A_REA	Map Custom Fields
ïhis may take a few minutes an	d cannot be canceled.	

Click Finish

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0 Items		

You will see the progress bar



You are Done !

If you need assistance importing your sales lead data into your third party software, please contact a technical support specialist at 708-786-5565.