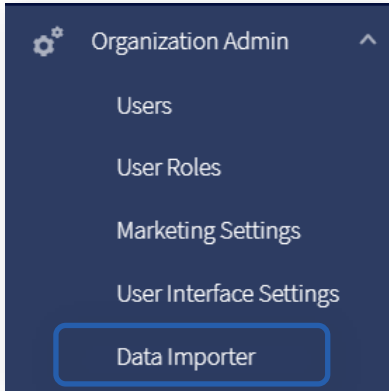


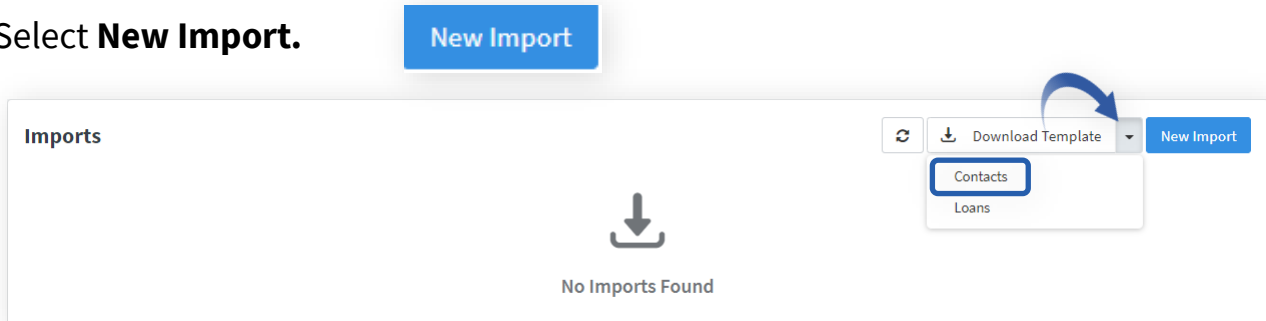
Getting Started



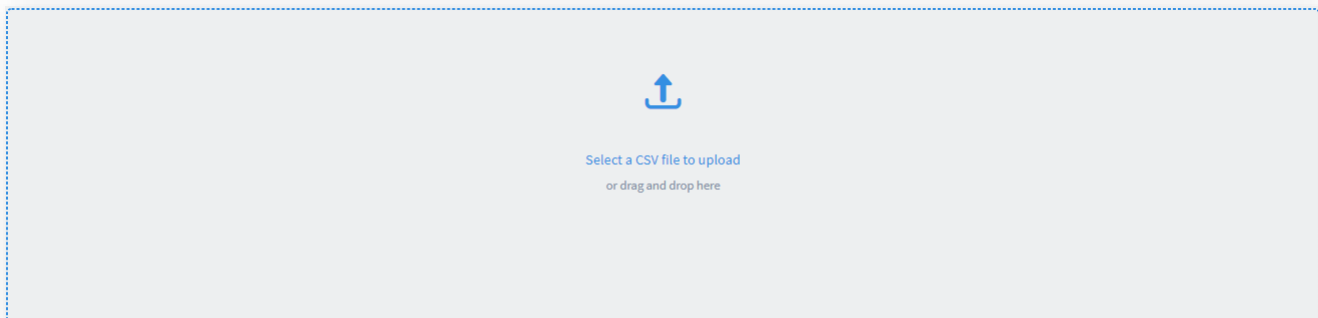
1. Login to Total Expert Now.
2. Access **Organizational Admin** in the main menu.
3. Select **Data Importer**.

Importing Contacts

1. From the **Download Template** drop down, select **Contacts**.
2. Open the downloaded template and update with your contact data.
3. Select **New Import**.



4. **Select a CSV file to upload**—this will be the file you created in Step 2.



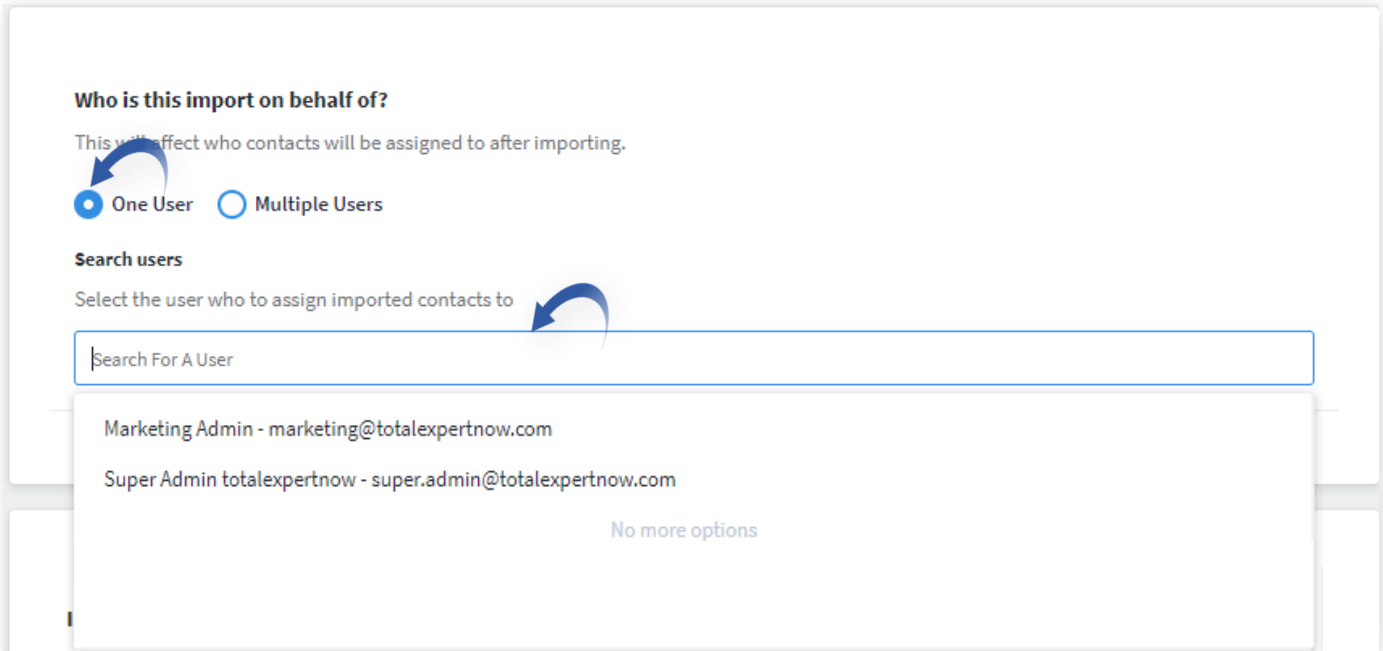
5. Select **Next**.



Importing Contacts (continued)

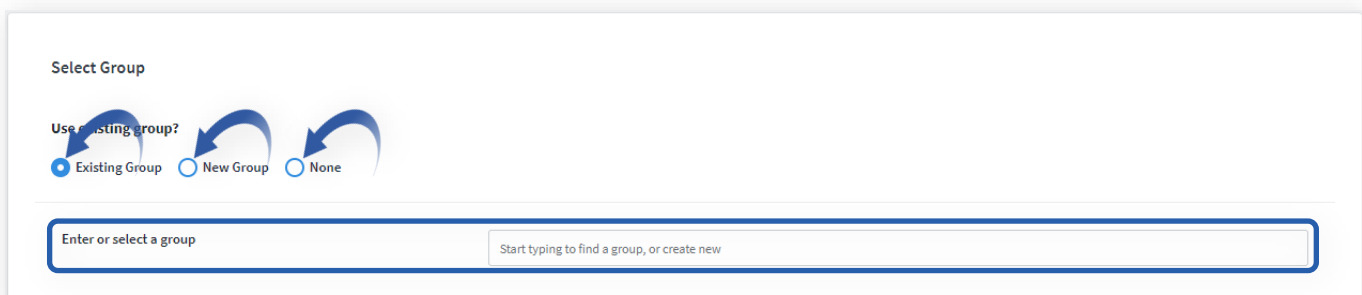
6. Select **One User**.

7. In the **Search For A User** field, select the user for which the contacts should be assigned.



8. If you would like the import process to add the imported contacts to a Group, in the **Select Group** tile, select either **Existing Group** or **New Group**. If you want to manually group your contacts after the import, select **None**.

- If you select **Existing Group**, in the **Enter or select group** field, select the desired group.
- If you select **New Group**, in the **Enter or select group** field, enter the name of the group that should be created.



Importing Contacts (continued)

- In the **Map Fields** tile, select **Apply Defaults** if you utilized the template from Step 2. Otherwise, for each column name, in the **TE Properties** drop down, select the appropriate field to map the content to.

Column Name From CSV	Preview Info	TE Properties
<input type="checkbox"/> contact.group.name	Prospect	Try searching: Loan Officer
<input type="checkbox"/> contact.note.notes	Need to contact regarding property info from Bob	Contact >
<input type="checkbox"/> contact.external_id	456798	Contact Group >
<input type="checkbox"/> contact.title	Mr.	Contact Note >
<input type="checkbox"/> contact.first_name	Robert	

- Select **Next**.



- Select **Test Import** to ensure there are no errors when importing the file. Any errors will be listed and will need to be resolved prior to loading the file.
- Once there are no errors, select the checkbox in the **Confirm merging and overwriting** tile.
- Select **Finish**.

Test import (optional)
This will test importing this contacts file on behalf of Marketing Admin. Records with errors will be skipped when importing.

Test import completed, no errors found.

Confirm merging and overwriting
Contacts with the same identifying information will be merged. If a contact already exists, the record will be overwritten with the information from the CSV file.

I understand contacts may be merged or overwritten