

Adding Contacts to the CRM

Check List

- Add individual leads/contacts manually into the CRM using the Add New Contact button

- Import contact spreadsheets using the booj CRM Import Contact Tool
 - Make sure your contact lists/spreadsheets are cleaned up and ready for import (*Complete CRM Exercise 1*)
 - Save all contact spreadsheets in a CSV file format
 - Use the Import List button to locate contact spreadsheet, match spreadsheet data to fields in booj CRM, and import