CRM Agent Exercise 2

Adding Contacts to the CRM

Let's practice!

Manually Adding a Contact

1. Access the **Contacts & Leads** section of the booj CRM. *(For instructions on accessing the Contacts & Leads section of the CRM – see Agent Version of CRM Exercise 2)*
2. Click the **+Add/Import** button and select **Add New Contact** from the dropdown
3. Type in a **First Name** and a **Last Name** into the first two fields
4. Select **Contact** or **Lead** as the **Type**
5. Select a tag from the **Tag** dropdown menu
6. Enter in an **Email, Phone Number,** or both
7. Click **Add**

*** Make sure to add at least 1 contact and 1 lead manually into the system***

Adding Contacts in Bulk

1. From the Contacts & Leads section of the CRM, click on the **+Add/Import** button
2. Click on **Import List** from the dropdown
3. Click into the **CSV File** field
4. Locate and select the **TTT Sample CSV file** (the file you wish to import) and click **Next.**
5. Under **Options** make sure that **Contacts** is selected
6. Under **Omit First Row from Import?, select Yes.**
7. Under the **Additional Tags** dropdown click on **First-Time Buyer**
8. Under **Data Matching** section, you will notice that all of the columns from the imported spreadsheet are under **Columns**. You will need to match the items located under the Columns field to the correct fields under **Matching Fields**.
9. Scroll through to verify all columns are matched correctly.
10. Click the **Import** button at the bottom of the page.
11. In the confirmation popup box click **Import**, then click **Done.**