CRM Agent Exercise 2

Adding Contacts to the CRM

Getting your contacts into the booj CRM is an imperative step in using the system to its full potential. There are many ways to add contacts into the booj platform. Explore each of the options listed below to discover which option works for your business needs.

**This exercise can only be completed once you have access to the booj CRM.*

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 below)***
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**

Adding Contacts in Bulk

Importing contacts into a CRM has never been easier. The booj CRM will support any CSV file housing your contacts regardless of the spreadsheet's column headers. This means that you are able to export existing contact lists from other systems, can import those contacts, and map the data into the correct fields in the new system easily and quickly. If you would prefer to use the the booj CSV Contact Import Template instead of importing an existing spreadsheet, you can do that as well. See both instructions below.

Downloading the booj CSV Contact Import Template

1. Access the **Contacts & Leads** section of the booj CRM. ***(For instructions on accessing the Contacts & Leads section of the CRM – see below)***
2. Click the **+Add/Import** button and select **Import List** from the dropdown
3. Click the blue **Download our Template** link. ***(Once clicked, the spreadsheet will likely automatically save to your computers Downloads folder.)***
4. Begin adding contacts to the CSV template.

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Importing a CSV File

1. Access the **Contacts & Leads** section of the booj CRM. *(For instructions on accessing the Contacts & Leads section of the CRM – see below)*
2. Click the **+Add/Import** button and select **Import List** from the dropdown.
3. Click into the **CSV File** field.
4. Locate and select the CSV file you wish to import and click **Next.**
5. You are able to configure the following import **Options** to fit your import needs:
   - Identifying import as Leads or Contacts
   - Omitting the First Row from import
     - *Use this option to skip importing the first row of data from your uploaded list. This is useful if your list has column headers such as "First Name", "Last Name", "Phone Number", etc.*
   - Selecting a Tag Date
     - *Today's Date: Use this option to add a tag of "Imported – [date]" to all contacts/leads in this import. Previous System Name: Use this option to add a tag of the system name that you selected in the initial step to all contacts/leads in this import. (option is not available if a system was not selected)*
   - Adding Additional Tags
6. Under the **Data Matching** section, you will notice that all of the headers housed on the spreadsheet you've imported are now located under the **Column field**. Please match the headers under Column to their new booj headers located under the **Matching Field** section.
7. Once all items are matched correctly, scroll down and click the blue Import button.
8. In the confirmation popup box, click **Import** and then click **Done**.

Accessing your Contacts & Leads

1. Log on to MAX/Center (www.remax.net) using your @remax.net email address and password
2. Within MAX/Center, click on the **booj** tile
3. Click on the **Contacts and Leads** tab at the top
4. Use the buttons in the upper-left labeled **All, Leads, and Contacts** to toggle between all contacts and leads in the system.