CRM Agent Exercise 1
Contact Clean-Up

Let's practice!

Organizing Contacts into the Sample CSV

1) From your **Train-the-Trainer Dropbox folder**, open the file titled **Gmail Export Sample**.
   - This is an example of what a contact export looks like from a Gmail account. This file can be imported as is into the CRM and mapped within the Contact Import tool or this list can be organized/modified using the **CSV Contact Import Template** where more information can be added to each contact.
2) From your Train-the-Trainer Dropbox, open the file titled **CSV Contact Import Template**
   - This is a sample of the CSV Contact Import Template that you can use to organize contacts. Using this template makes mapping fields within the Contact Import tool simple because the columns are already in the correct order. This is a great sheet to use when cleaning up contacts from multiple sources
3) Copy and paste fields from the Gmail Export Sample into the appropriate columns within the CSV Contact Import Template
4) Manually type in additional information to blank cells such as Tags, Birthdays and Notes
5) Select all fields, clear all formats and
6) Save file as a CSV.
7) Import CSV into the booj system.