

# Step 1 Import and Review

Import Contacts

Step 1 Import and Review Step 2 Map and Create More Fields

**1.1** Download CSV Template

Show 5 entries

**1.2** Delete Import CSV

**1.3** Confirm Selected Confirm All

Name	Short Name	Code	Category Source	Region Source	Default Phone Number	Default Email
No data available in table						

Showing 0 to 0 of 0 entries

Previous Next

1.1: Download the template csv file to begin the importing process.

1.2: After you completed the csv file click on the Import csv button and select your saved csv file to import.

You can also delete some records, after you have imported them, with the Delete button.

1.3: If you are happy with all the records you can confirm all the records by clicking the Confirm All button or you can only select a few records and confirm them by clicking the Confirm Selected button.

1.4 The More Fields button will show more details on the table.

## Step 2 Map and Create

The screenshot shows the 'Import Contacts' interface. At the top, there is a blue header with a question mark icon and the text 'Import Contacts'. Below this is a progress bar with two steps: 'Step 1 Import and Review' and 'Step 2 Map and Create'. The 'Step 2 Map and Create' step is highlighted in blue. In the main content area, there are three buttons: 'Unconfirm Selected', 'Unconfirm All', and 'Create All'. A red box highlights the 'Map Category', 'Map Region', and 'Map Controller' buttons, with a red '2.1' next to them. Another red box highlights the 'Unconfirm Selected' and 'Unconfirm All' buttons, with a red '2.3' next to them. A third red box highlights the 'Create All' button, with a red '2.2' next to it. Below the buttons is a search bar and a table with columns: Name, Short Name, Category Source, Mapped to Category, Region Source, Mapped to Region, Controller Source, and Mapped to Controller. The table is currently empty, showing 'No data available in table' and 'Showing 0 to 0 of 0 entries'. There are 'Previous' and 'Next' buttons at the bottom right of the table.

2.1: After Confirming some records they will appear at the Step 2 Map and Create Section and then you can start Mapping your records.

2.2: After you have mapped all your records you can then create them, and they will then be in your To Do List.

2.3: You can Unconfirm Selected records or all the records if you want to go back and start from step 2.