Step 1 Import and Review
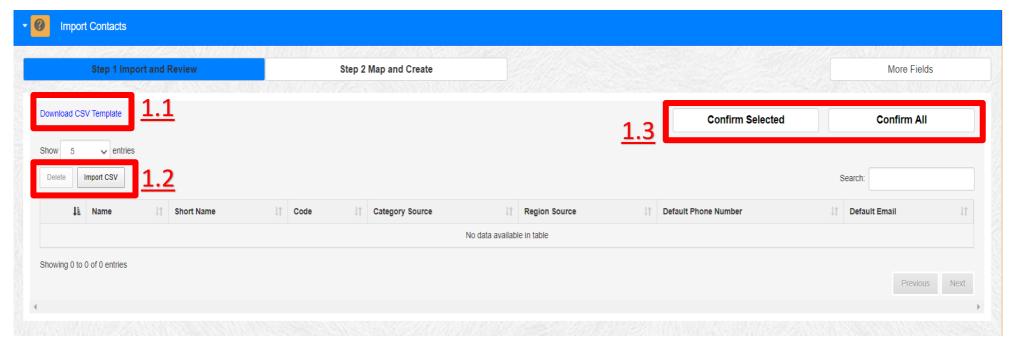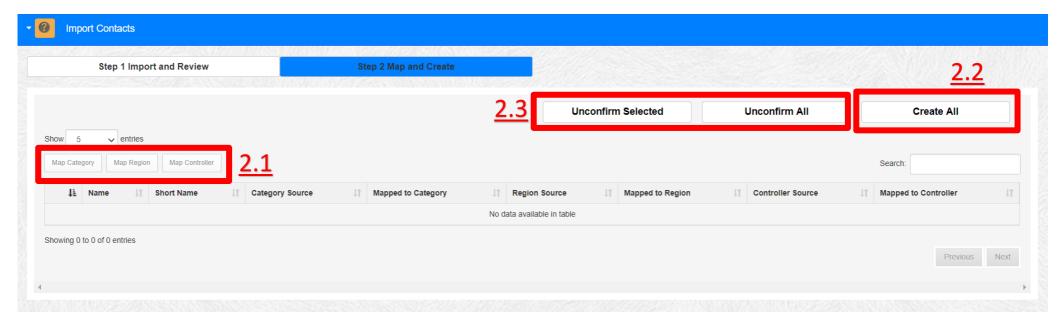

1.1: Download the template csv file to begin the importing process.

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

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.