

# Step 1 Import and Review

Import Tasks

Step 1 Import and Review Step 2 Map and Create

Download CSV Template **1.1**

Show 5 entries

Delete Import CSV **1.2**

Search:

**1.3** Confirm Selected Confirm All

Subject	Details	Priority	Tracking	Due Date	Repeat Type Source	Contact Source	Activity Source	Assignee Source	Warning Days
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.

## Step 2 Map and Create

Import Tasks

Step 1 Import and Review Step 2 Map and Create

2.3 Unconfirm Selected Unconfirm All Create All

2.1 Map Repeat Options Map Contact Map Activity Map Assignee

Show 5 entries

Search:

Subject	Due Date	Repeat Type Source	Repeat type	Every Number	Ends After # Repeats	Contact Source	Mapped to Contact	Activity Source	Mapped to Activity	Assignee Source	Mapped to Assignee
No data available in table											

Showing 0 to 0 of 0 entries

Previous Next

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.