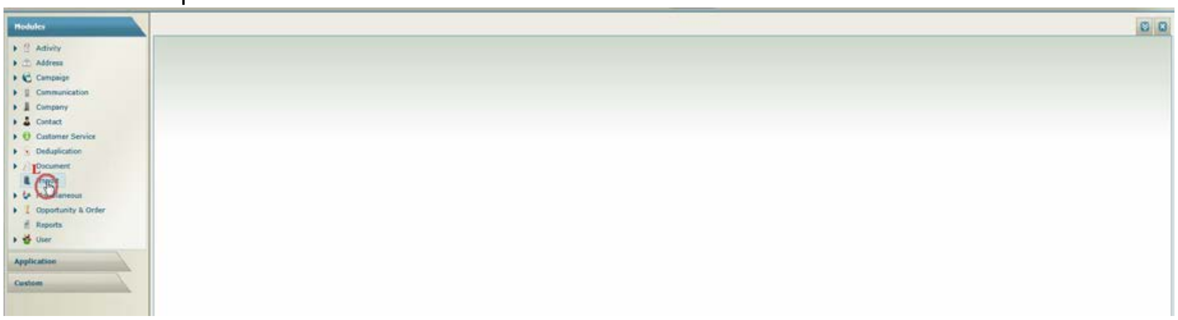
12/5/2013

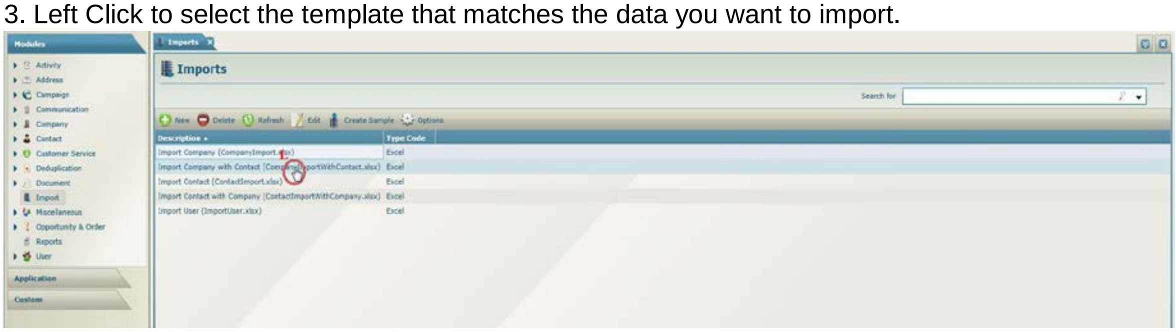
Run Data Import

1. Left Click Setup.

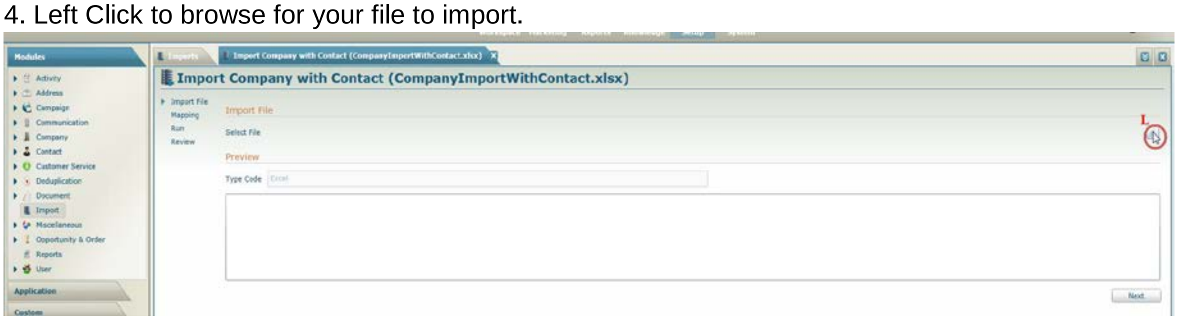
2. Left Click Import.



3. Left Click to select the template that matches the data you want to import.

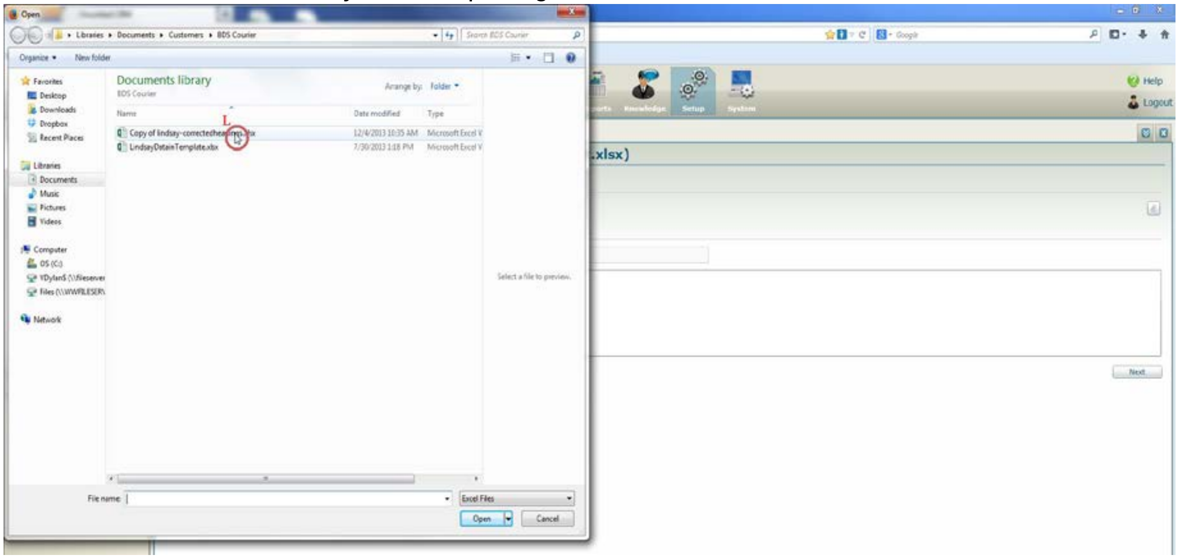


4. Left Click to browse for your file to import.

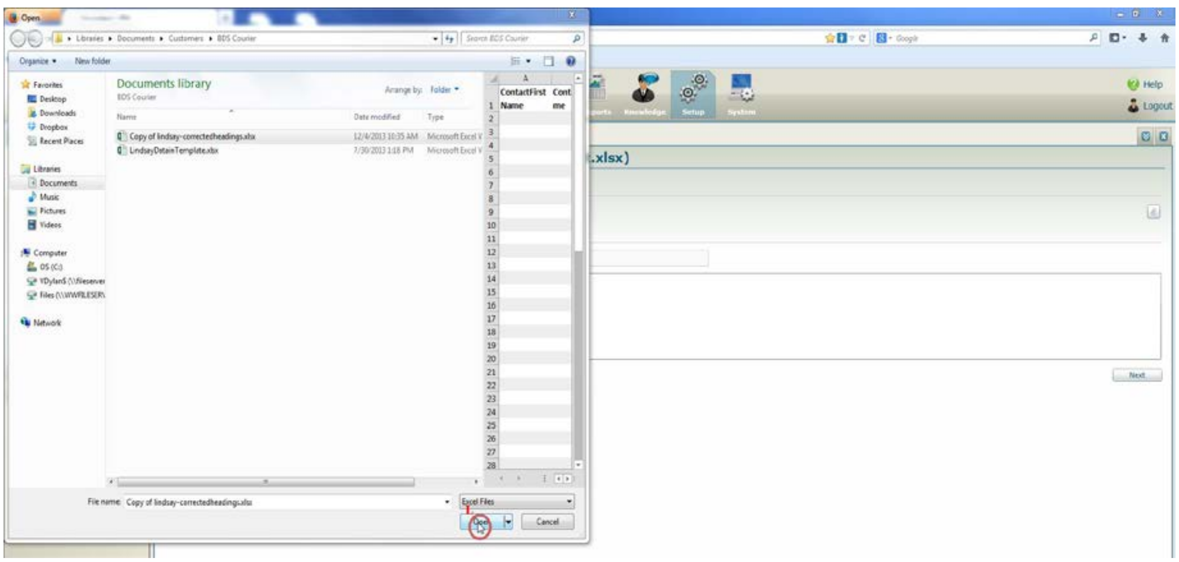


Run Data Import

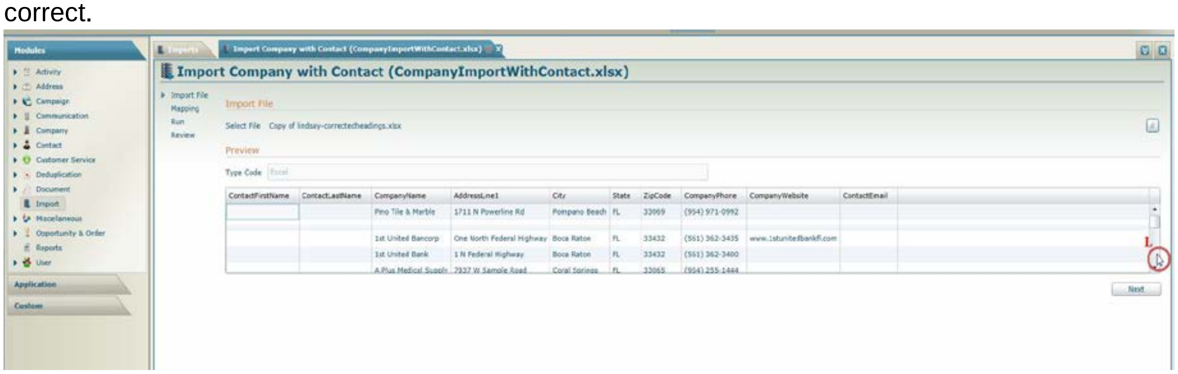
5. Left Click to select the file you are importing.



6. Left Click OK.

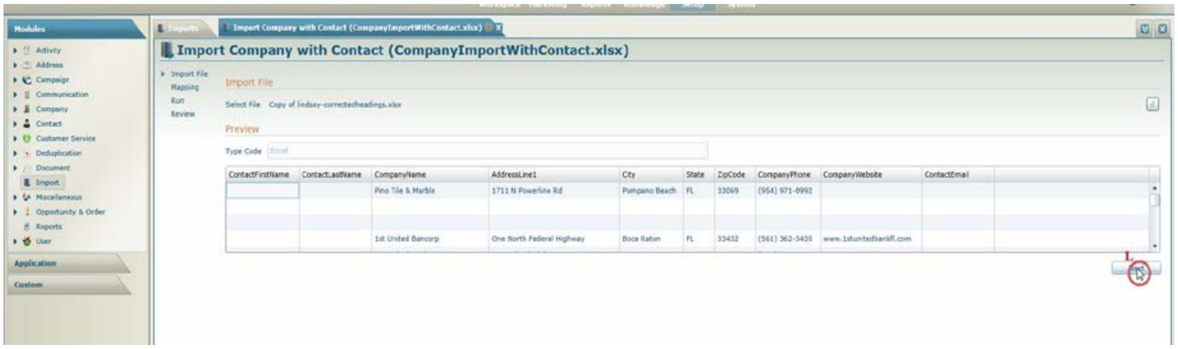


7. A preview of your data is shown here. Scroll through the preview to make sure that it looks correct.



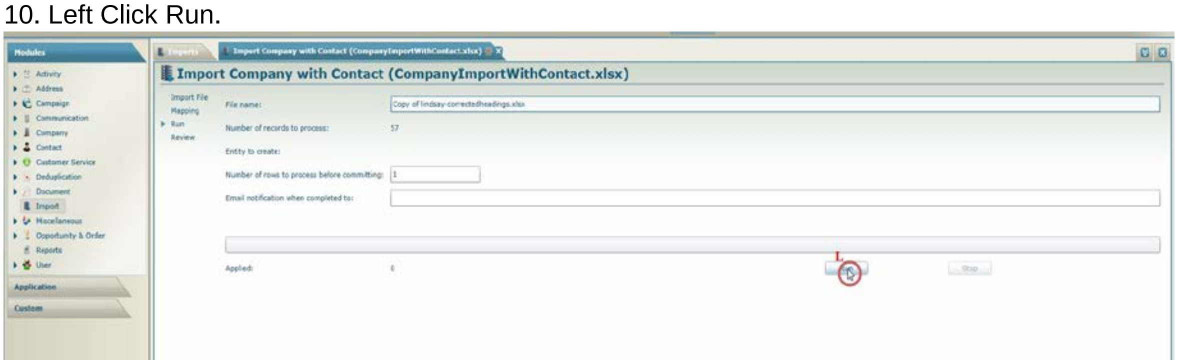
Run Data Import

8. If the data looks correct, click Next.



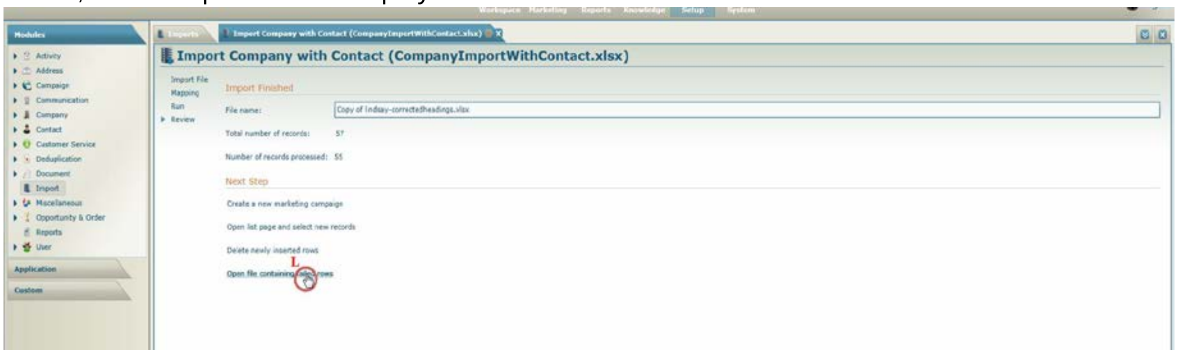
9. The left side of this screen shows the fields that were found in your file. The right side shows where the data will be mapped in CRM. If it looks correct, click Next. If fields were found in your file that were not mapped, click the right side of the screen to select a field to map it to.

10. Left Click Run.

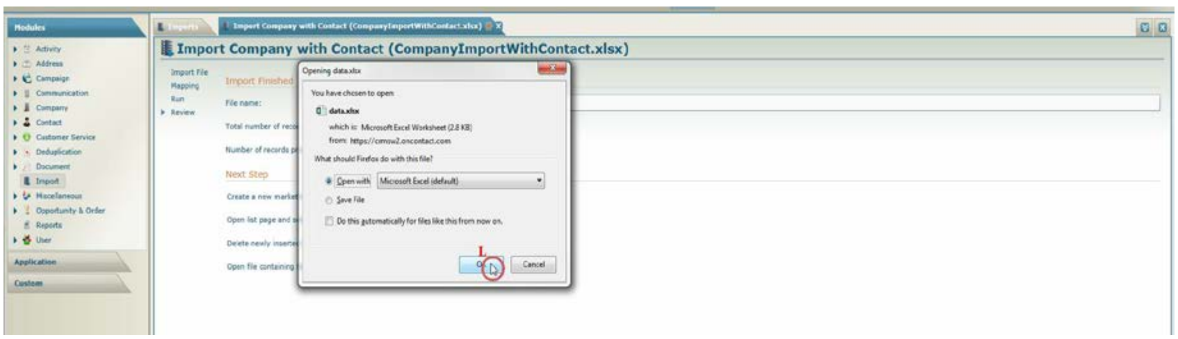


Run Data Import

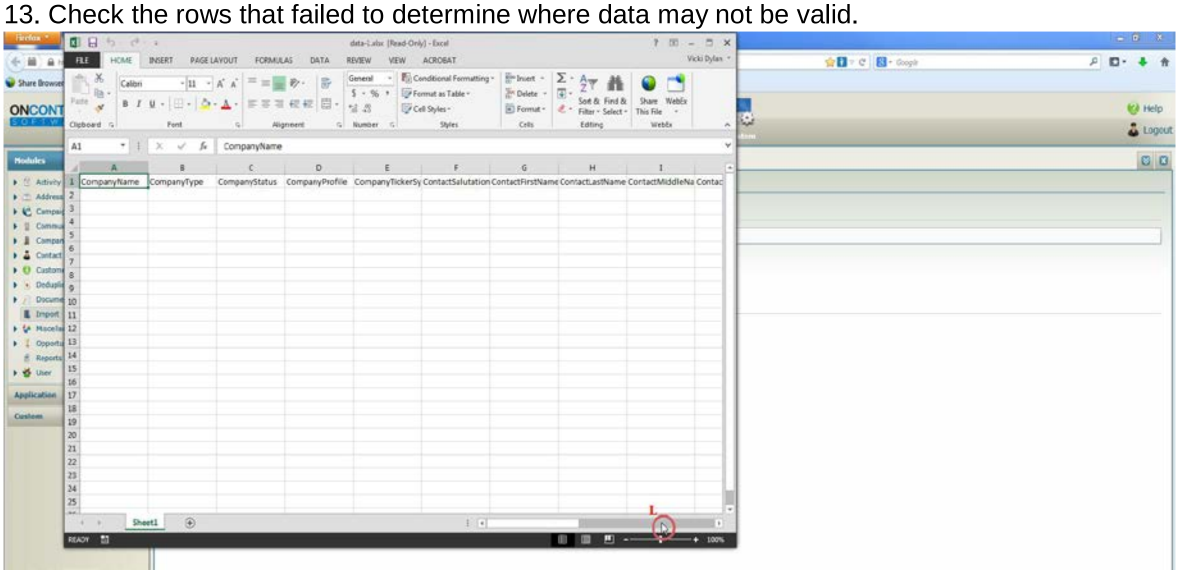
11. Verify that the total number of rows in your file match the total number imported. If they do not match, click to open a file to display the rows that failed.



12. Left Click- OK

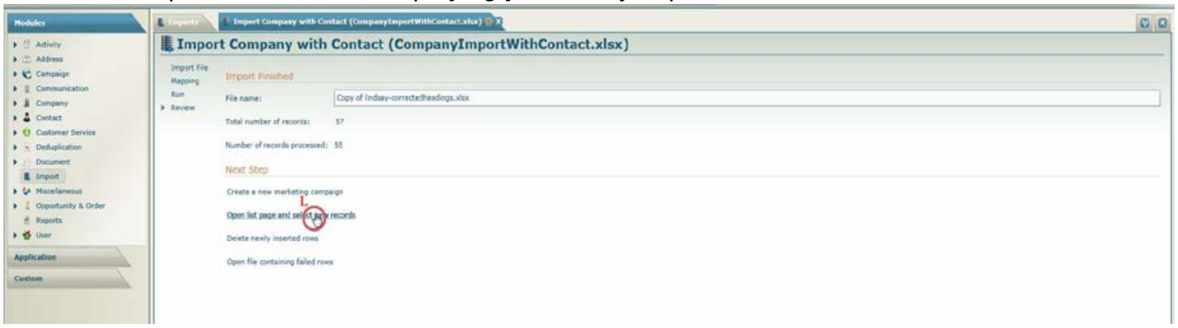


13. Check the rows that failed to determine where data may not be valid.



Run Data Import

14. You can open a List screen displaying your newly imported data.



15. From this screen you can select one or more of these records and send mass emails, assign activities and much more!