Click on the icon to launch step-by-step instructions for each task.

Setup spreadsheet

Import Contacts

Search for & Save contacts in a list

View Contact Information

1. Setting up CSV files

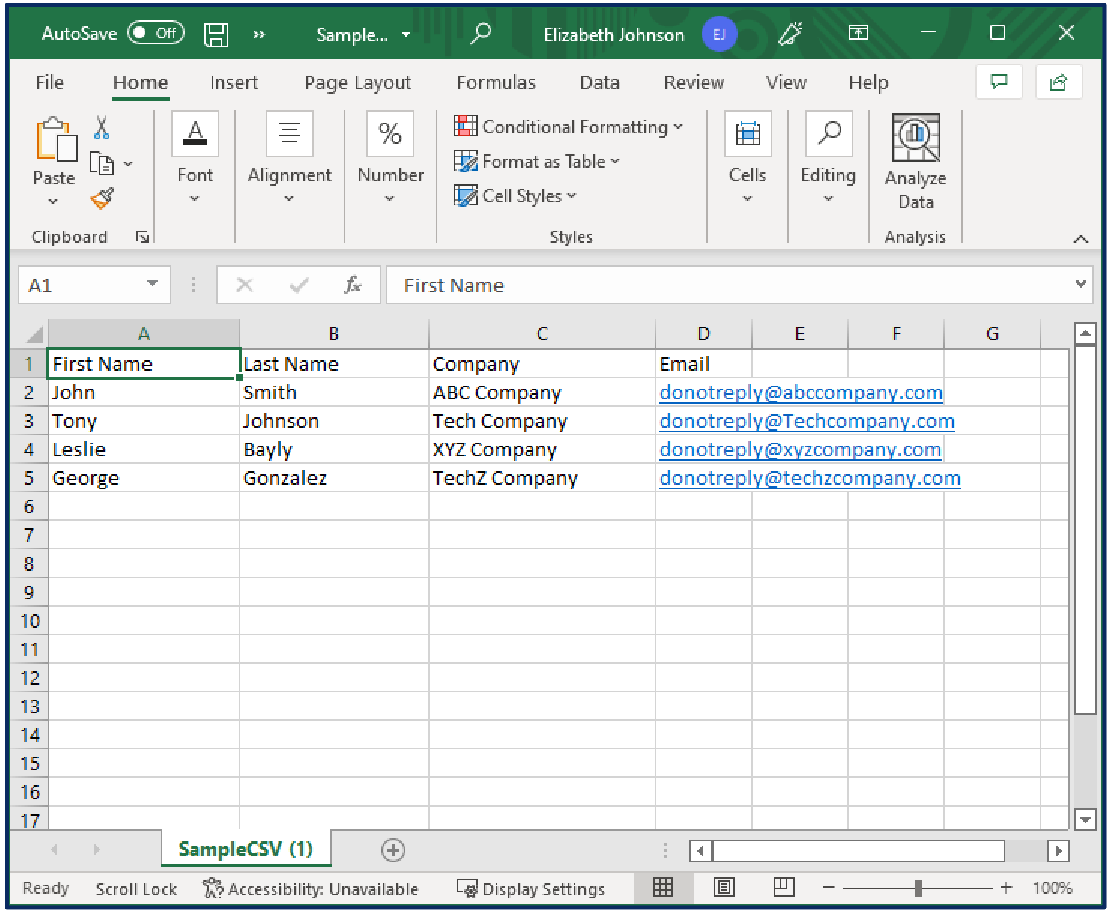
Main Menu

Before importing your contacts list, be sure to prepare your spreadsheet. Partner Marketing Center requires a comma-separated file (or .csv) and requires, at a minimum, the following fields:

- First name
- Last Name
- Company
- Email Address

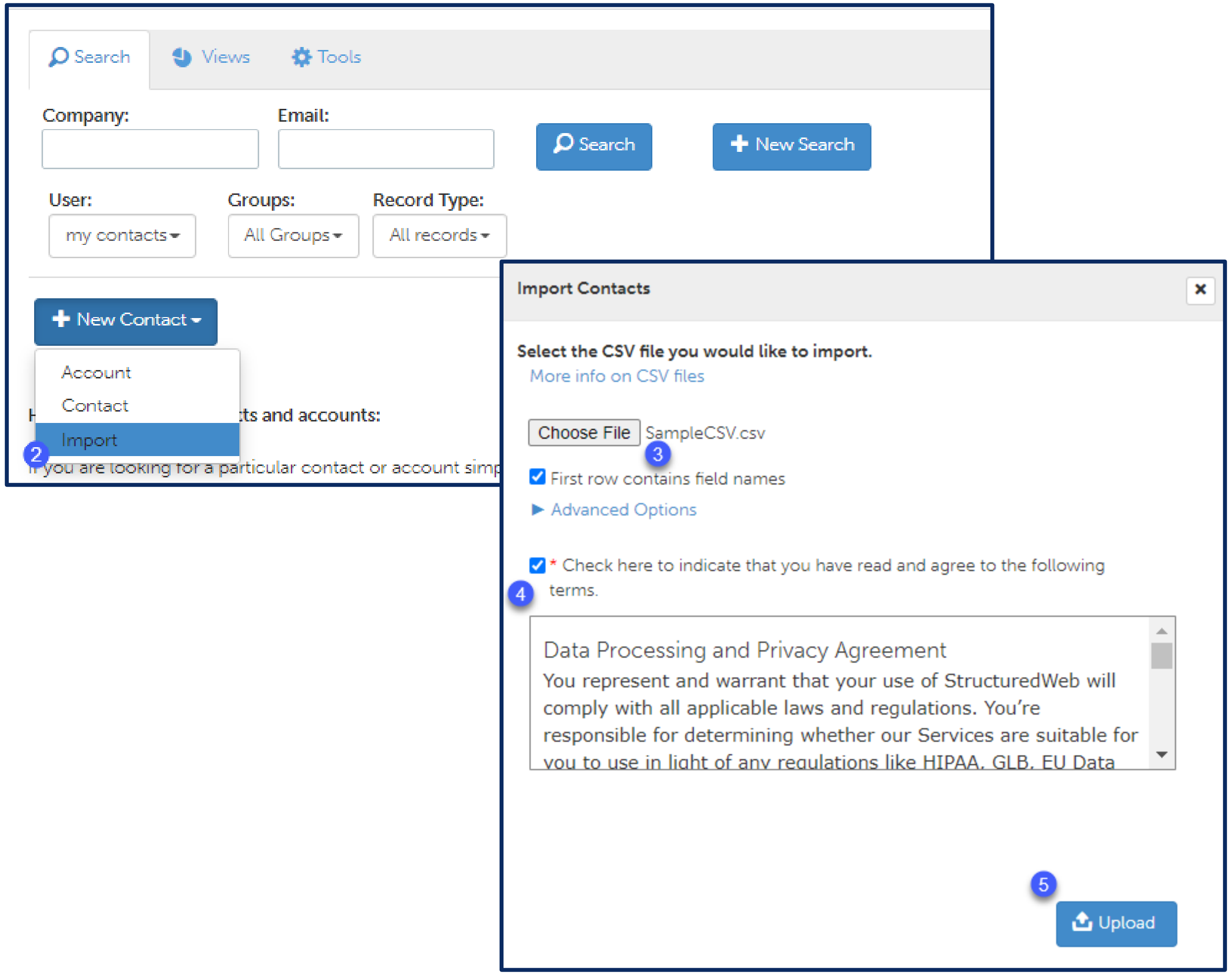
(Note: Each field must reside in a separate column header, i.e., First Name and Last Name must be separated. See the example to the right.)

Once imported, map your column header to the appropriate field name.



2. Importing Contacts(1)

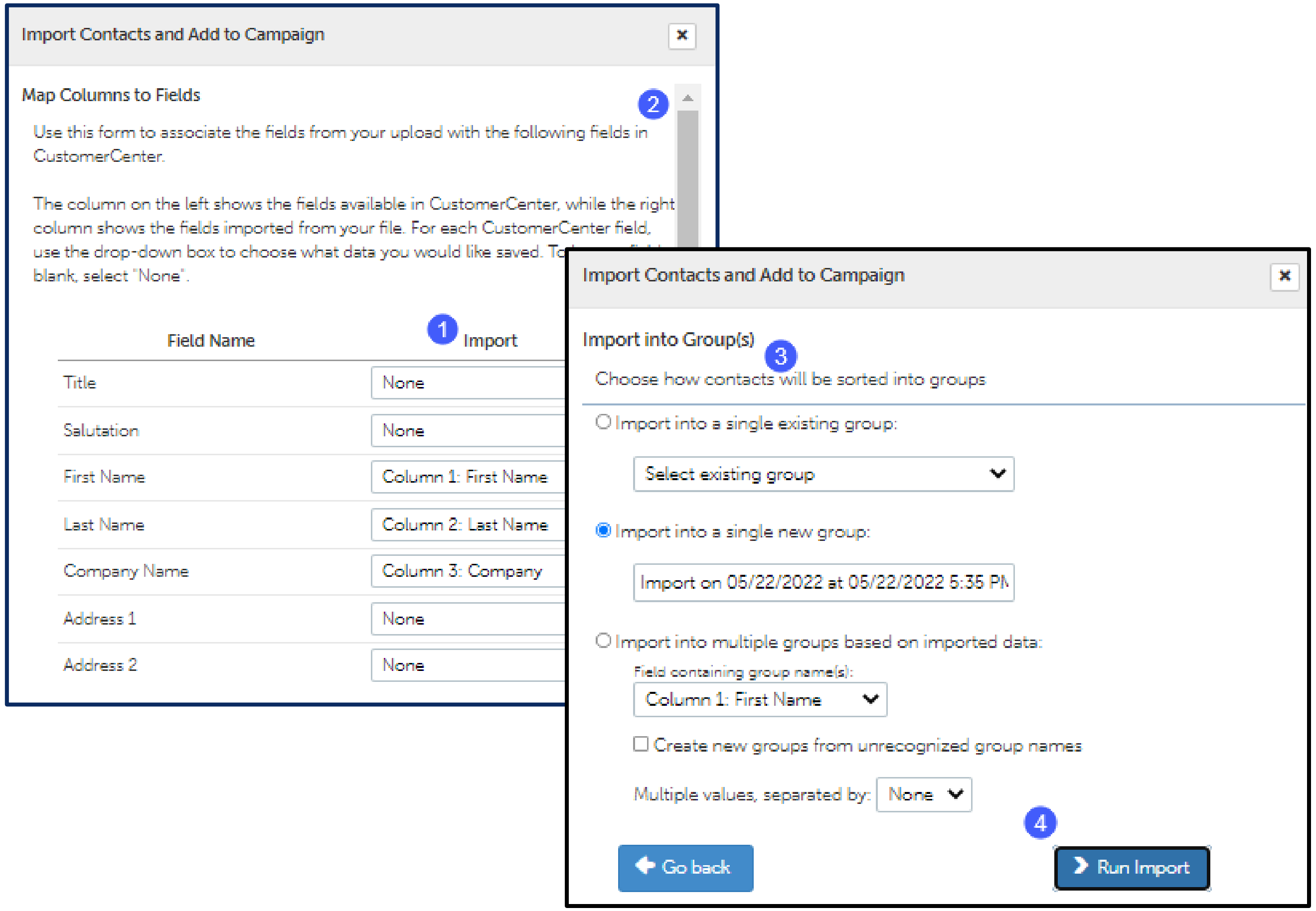
1. From the toolbar, select **My Marketing > Contacts**. Then select **Contacts** From the **Search** tab, select **New > Import**.
2. From the Import Contacts box, click **Choose File**, then select the **prepared CSV file** from your local drive. (See Setting up CSV files.)
3. Above the **Data Processing and Privacy Agreement** box, click the **check box**.
4. Click **Upload**.



2. Importing Contacts(2)

1. In the **Import** row, select the **appropriate column header.**
2. **Scroll to the bottom** of the box. Then, click **Continue**. A box opens
3. From the **Import into Group(s)** area, select the **option** that best suits your needs. (Note: when creating a new group, in the text box, rename the group to easily identify contacts.)
4. Click **Run Import.**

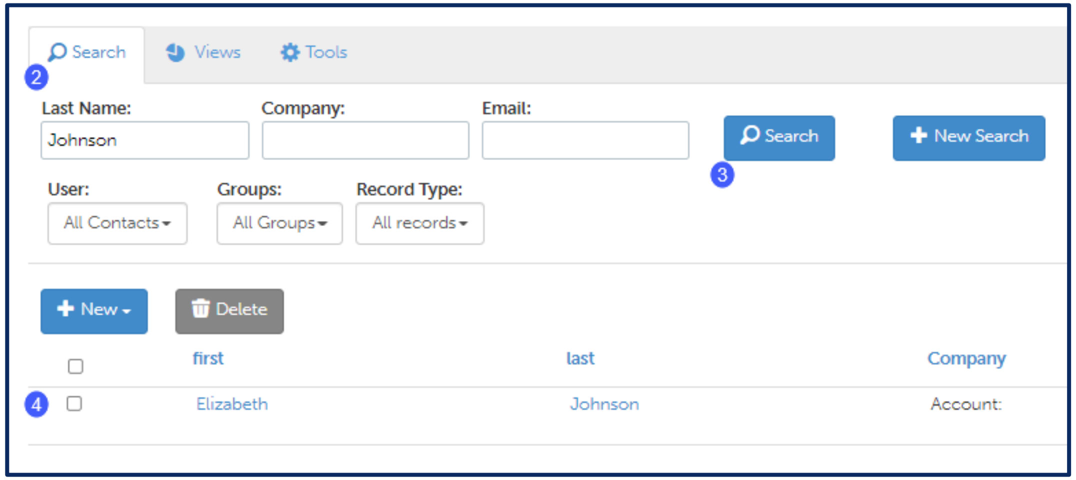
Once contacts have been uploaded you find a confirmation page alerting you that all contacts have been uploaded successfully.



3. Searching for Contacts (Quick Search)

To search for a specific contact record, use the quick search tool. Do the following:

1. From the toolbar, select **Reports & Contacts** > **Contacts**.
2. In the **Search** tab, enter one of the following fields:
   - **Last Name**
   - **Company**
   - **Email**
3. Click **Search**. (Note: to view all contacts at once, click Search)
4. At the **bottom** of the page, find your **contact**.

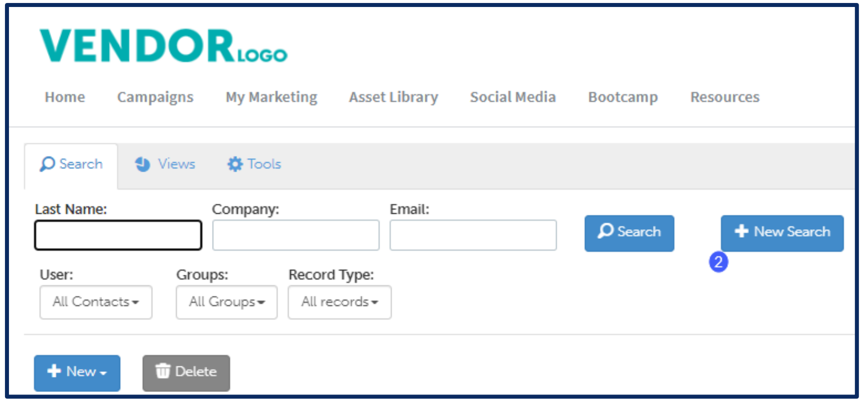


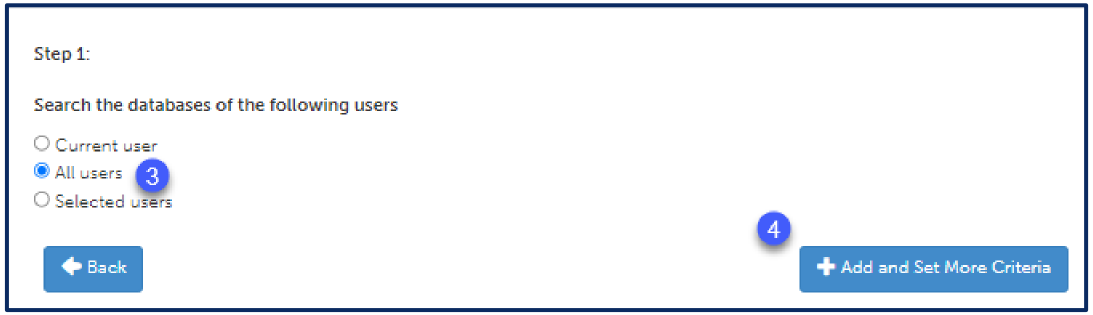
2. Searching for Contacts(Advanced 1)

Partner Marketing Center includes a robust search engine that allows you to search and save your contact by a variety of criteria. Searching allows you to create contact lists targeted by region, lead score, and more.

To create a search, do the following:

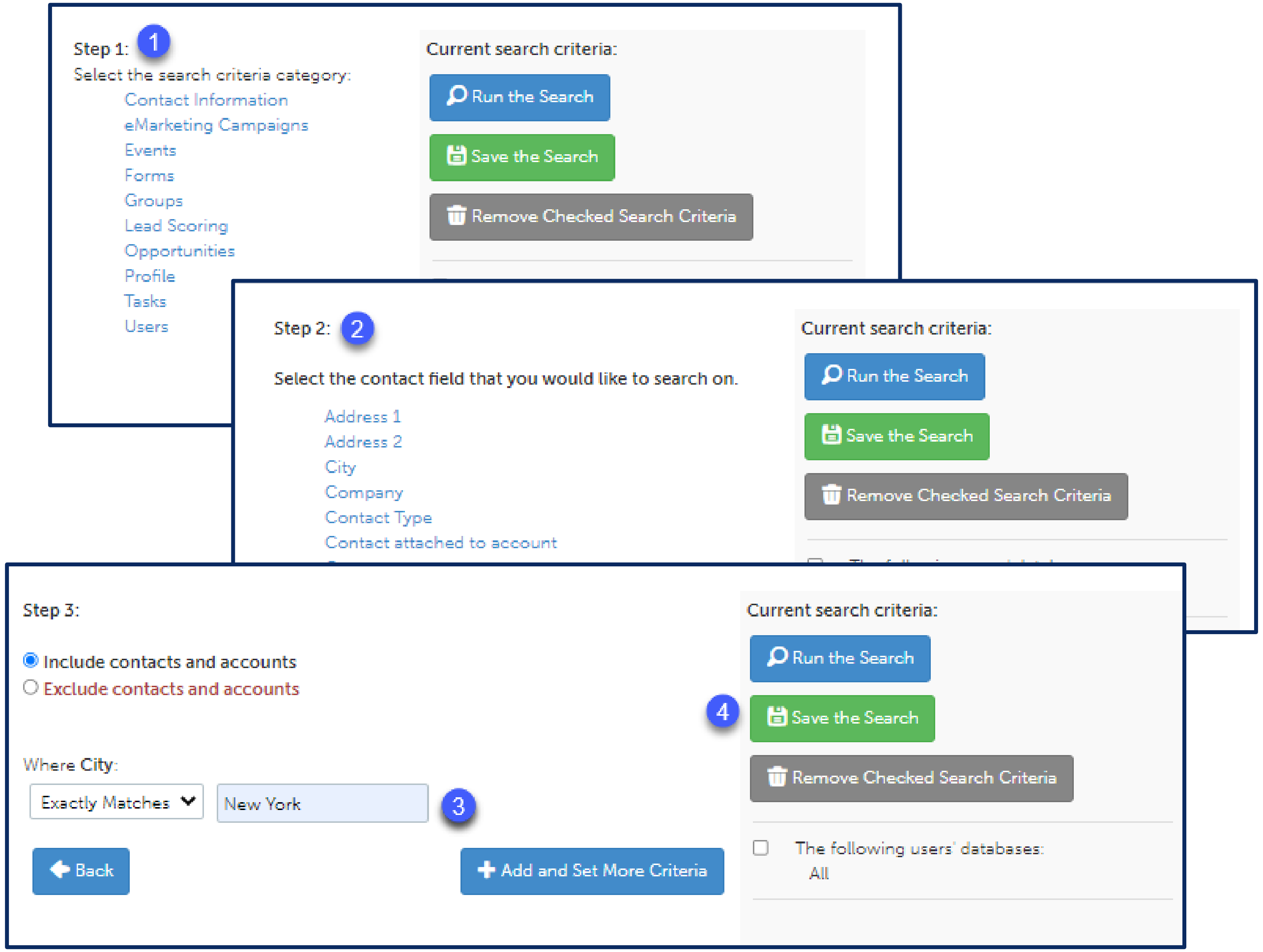
1. From the toolbar, select **Reports & Contacts > Contacts.** (Review How do I navigate the Partner Marketing Center?)
2. In the **Search** tab, click **New Search**. A new page opens.
3. In Step 1, select **All Users**. (Note: when selecting All Users, all contacts will appear across all users of the platform.)
4. Click **Add and Set More Criteria**.





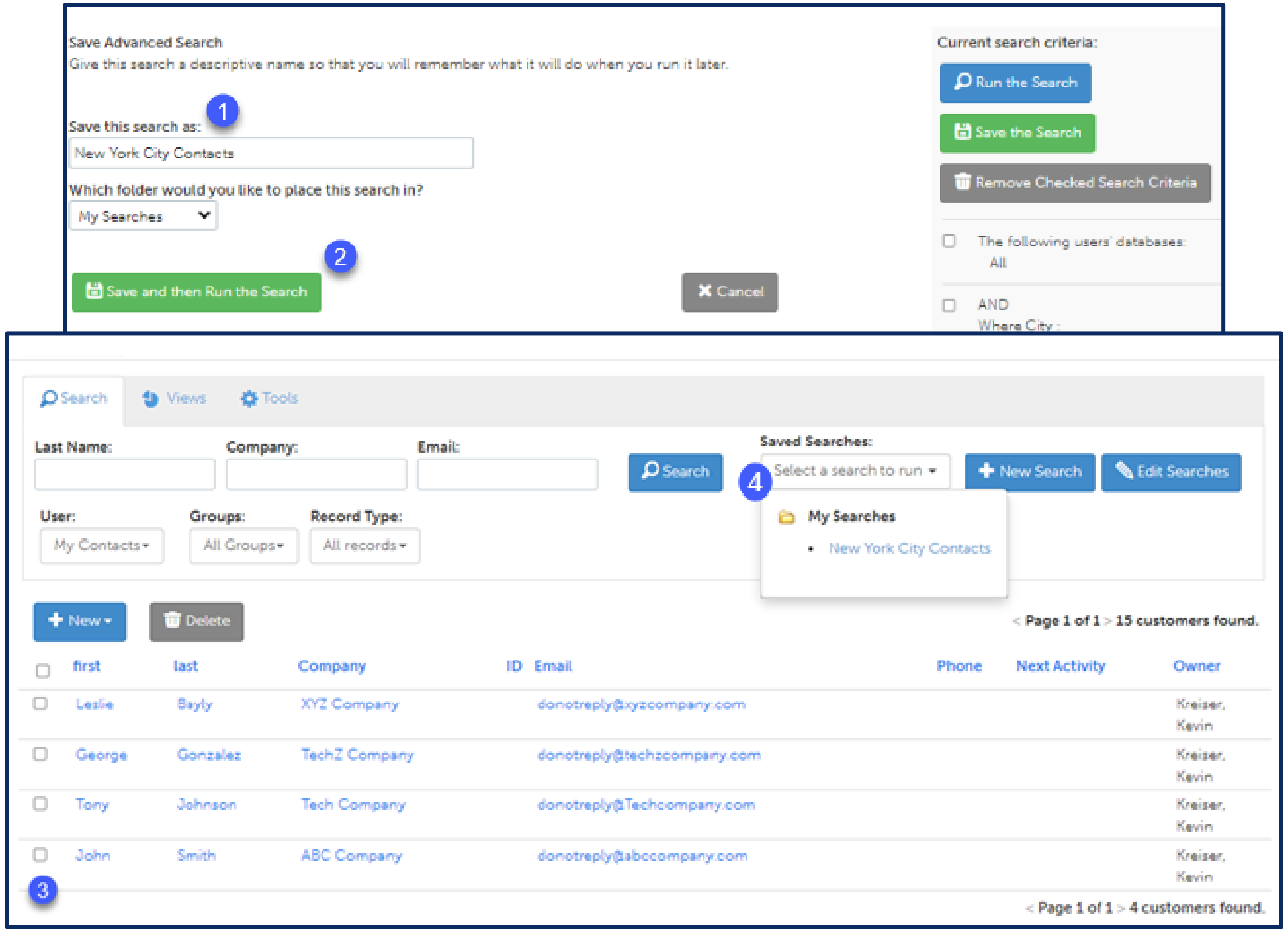
3. Searching for Contacts (Advanced 2)

1. From the **Select the search category** area, select the **appropriate search criteria**. (In this example, Contact Information is selected).
2. From the **Select the contact field that you would like to search on** area, select the **appropriate contact field**. (In this example, City is selected)
3. Within Step 3, enter the **appropriate criteria** (In this example, New York is entered)
4. Click **Save the Search**.



3. Searching for Contacts (Advanced 3)

1. From the Save Advanced Search page, in the **Save this search as** text box, type the **name** of your search.
2. Click **Save and then Run the Search.** Your search opens in the Contacts window.
3. At the **bottom** of the page, find your **contacts**.
4. To access your saved search, click the **Select a search to run** box. Then select your saved search.



4. Viewing Contact information

Once your contact is imported, click directly on the contact record to view, update, and add contact information. Contact information is broken into the following tabs:

- Contact
- Profile
- Addresses
- Groups

To make changes to records in mass, re-import your contact list. The system will override any existing contact record.