

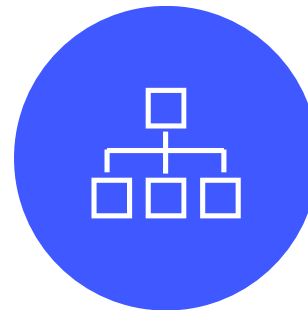
Click on the icon to launch step-by-step instructions for each task.



Setup spreadsheet



Import Contacts



Search for & Save
contacts in a list



View Contact
Information

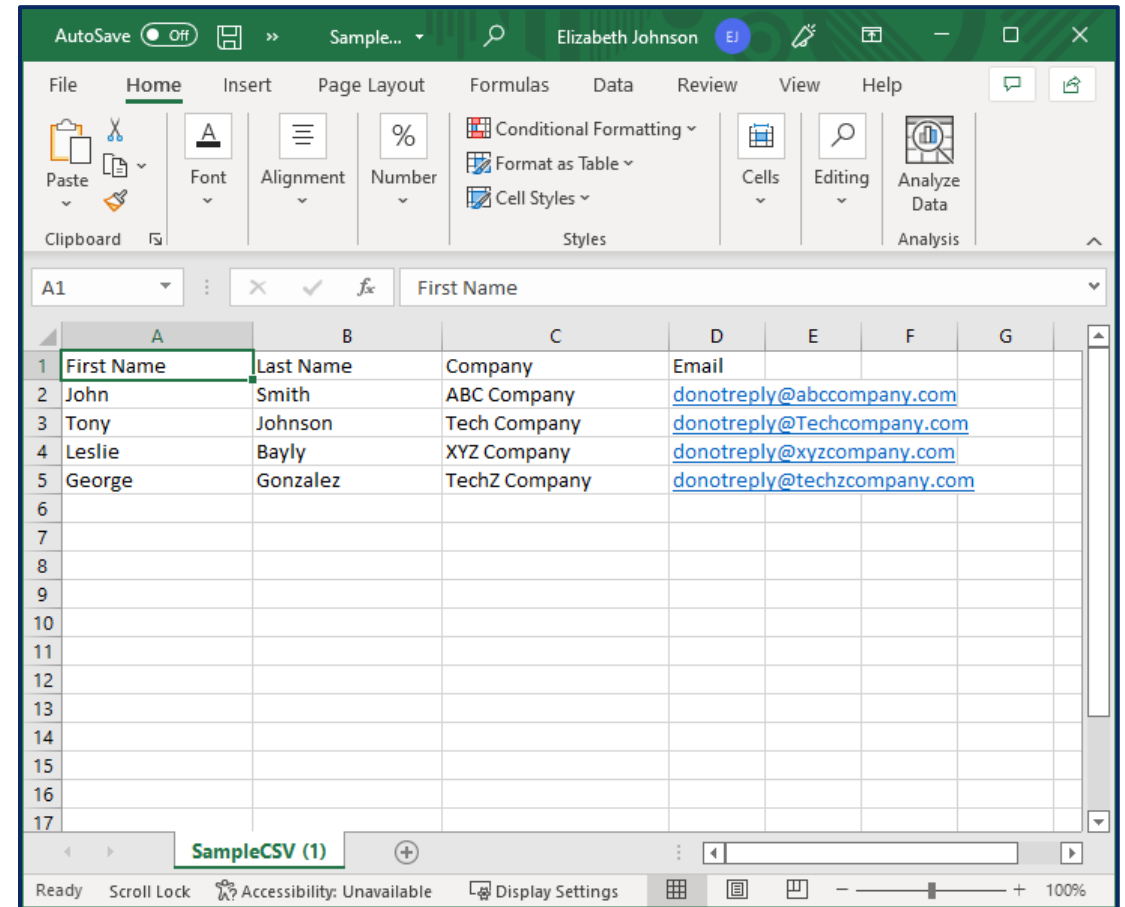
1. Setting up CSV files

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)

Main Menu

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**.

The screenshot shows the 'Import Contacts' dialog box in the StructuredWeb interface. The dialog box is titled 'Import Contacts' and contains the following elements:

- A search bar with 'Search', 'Views', and 'Tools' buttons.
- Input fields for 'Company:' and 'Email:' with a 'Search' button and a '+ New Search' button.
- Dropdown menus for 'User:' (set to 'my contacts'), 'Groups:' (set to 'All Groups'), and 'Record Type:' (set to 'All records').
- A '+ New Contact' dropdown menu with options: 'Account', 'Contact', and 'Import' (highlighted with a blue circle and the number 2).
- A 'Choose File' button (highlighted with a blue circle and the number 3) next to the filename 'SampleCSV.csv'.
- A checked checkbox for 'First row contains field names' and a link for 'Advanced Options'.
- A checked checkbox for '* Check here to indicate that you have read and agree to the following terms.' (highlighted with a blue circle and the number 4).
- A scrollable text area containing the 'Data Processing and Privacy Agreement' text.
- An 'Upload' button (highlighted with a blue circle and the number 5) at the bottom right.

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.

The screenshot shows two overlapping windows from the 'Import Contacts and Add to Campaign' process. The top window is titled 'Map Columns to Fields' and contains a table for mapping imported columns to system fields. The bottom window is titled 'Import into Group(s)' and shows options for how to sort contacts into groups.

Map Columns to Fields

Use this form to associate the fields from your upload with the following fields in CustomerCenter.

The column on the left shows the fields available in CustomerCenter, while the right column shows the fields imported from your file. For each CustomerCenter field, use the drop-down box to choose what data you would like saved. To save blank, select 'None'.

Field Name	Import
Title	None
Salutation	None
First Name	Column 1: First Name
Last Name	Column 2: Last Name
Company Name	Column 3: Company
Address 1	None
Address 2	None

Import into Group(s)

Choose how contacts will be sorted into groups

Import into a single existing group:

Select existing group:

Import into a single new group:

Import on 05/22/2022 at 05/22/2022 5:35 PM

Import into multiple groups based on imported data:

Field containing group name(s):

Create new groups from unrecognized group names

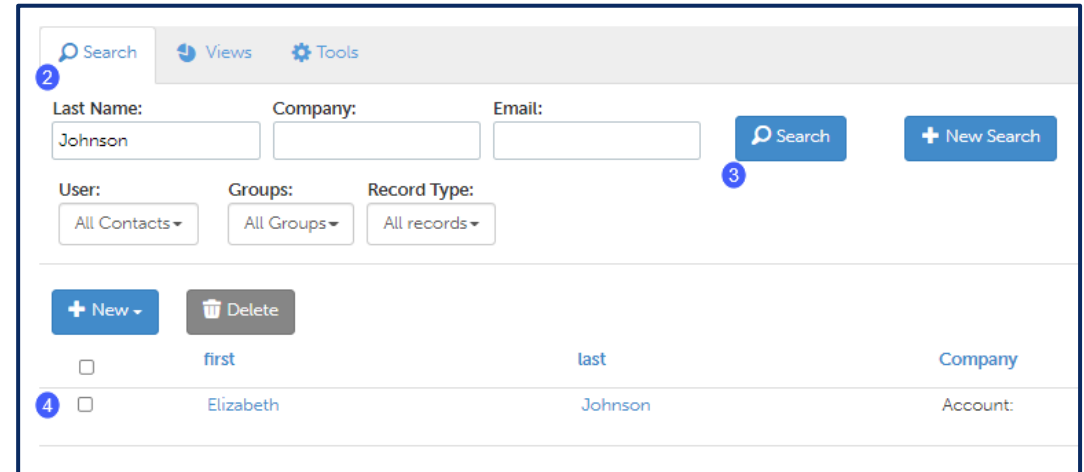
Multiple values, separated by:

Go back Run Import

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)

Main Menu

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**.

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Home Campaigns My Marketing Asset Library Social Media Bootcamp Resources

Search Views Tools

Last Name: Company: Email: Search + New Search

User: Groups: Record Type: All Contacts All Groups All records

+ New Delete

Step 1:

Search the databases of the following users

Current user

All users 3

Selected users

Back Add and Set More Criteria 4

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**.

The image displays three overlapping screenshots of a search interface, illustrating the steps for searching for contacts. Each screenshot shows a 'Current search criteria' section with buttons for 'Run the Search', 'Save the Search', and 'Remove Checked Search Criteria'.

- Step 1:** Shows the 'Select the search criteria category:' section. The 'Contact Information' option is selected. The 'Run the Search' button is highlighted.
- Step 2:** Shows the 'Select the contact field that you would like to search on.' section. The 'City' option is selected. The 'Run the Search' button is highlighted.
- Step 3:** Shows the 'Include contacts and accounts' section with 'Include contacts and accounts' selected. The 'Where City:' section has 'Exactly Matches' selected in the dropdown and 'New York' entered in the text field. The 'Save the Search' button is highlighted.

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.

The image shows two screenshots from a CRM application. The top screenshot is the 'Save Advanced Search' dialog box. It has a text input field labeled 'Save this search as:' containing 'New York City Contacts', a dropdown menu for 'Which folder would you like to place this search in?' set to 'My Searches', and a green button 'Save and then Run the Search'. The bottom screenshot is the main search interface. It features search filters for 'Last Name', 'Company', 'Email', 'User', 'Groups', and 'Record Type'. A 'Saved Searches' dropdown menu is open, showing 'My Searches' with a sub-item 'New York City Contacts'. Below the filters is a table of search results with columns for 'first', 'last', 'Company', 'ID', 'Email', 'Phone', 'Next Activity', and 'Owner'. The table shows five records. A blue circle with the number '3' is placed at the bottom left of the table area.

4. Viewing Contact information

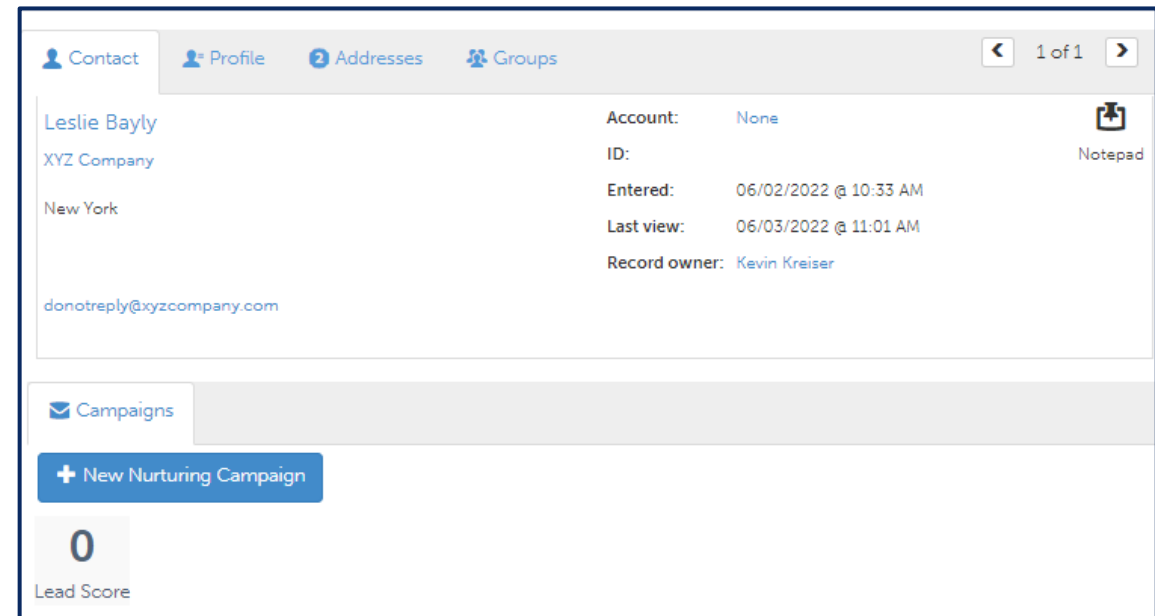
Once your contact is imported, click directly on the contact record to view, update, and add contact information. Contact information is broken into the following tabs:

- Contact
- Profile
- Addresses
- Groups

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



<input type="checkbox"/>	first	last	Company	ID	Email
<input type="checkbox"/>	Leslie	Bayly	XYZ Company		donotreply@xyzcompany.com
<input type="checkbox"/>	George	Gonzalez	TechZ Company		donotreply@techzcompany.com



Navigation: Contact | Profile | Addresses | Groups | 1 of 1

Leslie Bayly
XYZ Company
New York
donotreply@xyzcompany.com

Account: None
ID: [Notepad icon]
Entered: 06/02/2022 @ 10:33 AM
Last view: 06/03/2022 @ 11:01 AM
Record owner: Kevin Kreiser

Campaigns

+ New Nurturing Campaign

0
Lead Score