## <u>RE∕JLM</u><sup>™</sup>

## Tips & Tricks

## How to import contacts

In REALM<sup>™</sup>, you can import contacts from Stratus. Note: to do this, you will first need to download your Stratus contacts and save them as a CSV file.

Here are the steps to import your contacts into REALM™:

- 1. Select **Contacts** from the menu bar in REALM<sup>™</sup>.
- 2. Click the action arrow and then select **Import Contacts** from the drop-down menu.

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Searc	h Contac	S		**	Contacts								r> ▼	
Recent	Clients	Members	Teams		You don't have any eligente set					Add Ne	w Clien	t		
	Nothing found			fou con thave any chemic yet.				<u> </u>	Export	Clients.				

## 3. Select Browse files.



**4.** Navigate to the directory on your computer where the previously saved CSV file is located, select it, and then click **Open**.







Import Clients - Upload	CSV	×
	Drop a CSV file or	
TREB Contact (1).csv	Browse files (825 B)	×
Cancel		5 Upload

6. A window will appear with a list of contacts from the CSV file. Using the checkboxes, choose the contacts to be imported and then select **Import**.

	Full Name	Organization	Email Address	Phone Number
I	Anna Buyer		Anna.Buyer@email.com	
I	Barry Buyer		Barry.Buyer@email.com	
	Chris Buyer		Chris.Buyer@email.com	
	David Buyer		David.Buyer@email.com	
I	Erin Buyer		Erin.Buyer@email.com	
	Fred Buyer		Fred.Buyer@email.com	
l	George Buyer		George.Buyer@email.com	

Note: Each contact must have an email or phone number to import. If this information is missing, you will see the contact in the list but will not be able to select and import them.

If you have an existing contact in REALM<sup>™</sup> with the same email address, you will not be able to select and import.

You may edit empty input boxes in this window before importing.

7. All selected contacts will import into your active contacts in REALM™.

If you have any questions, please contact us at <u>Help@REALMmlp.ca</u>.

