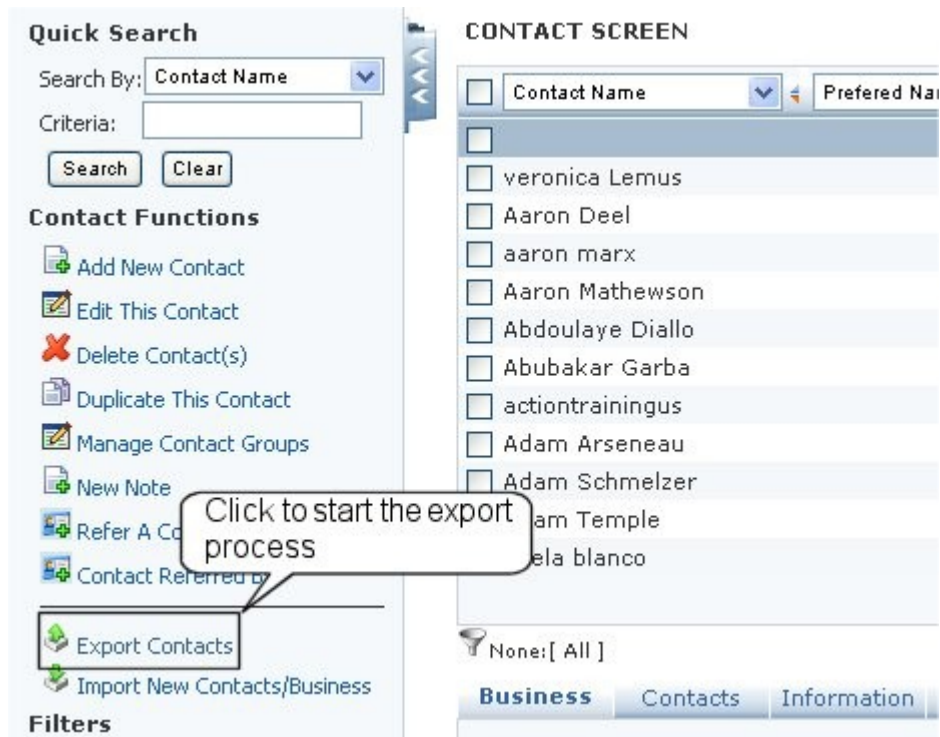


Exporting contacts from MyActionCRM to ActionCoach CRM

1. Login to your MyActionCRM account using your username and password
2. Click on the Contacts button to enter the Contacts module (See screenshot below)

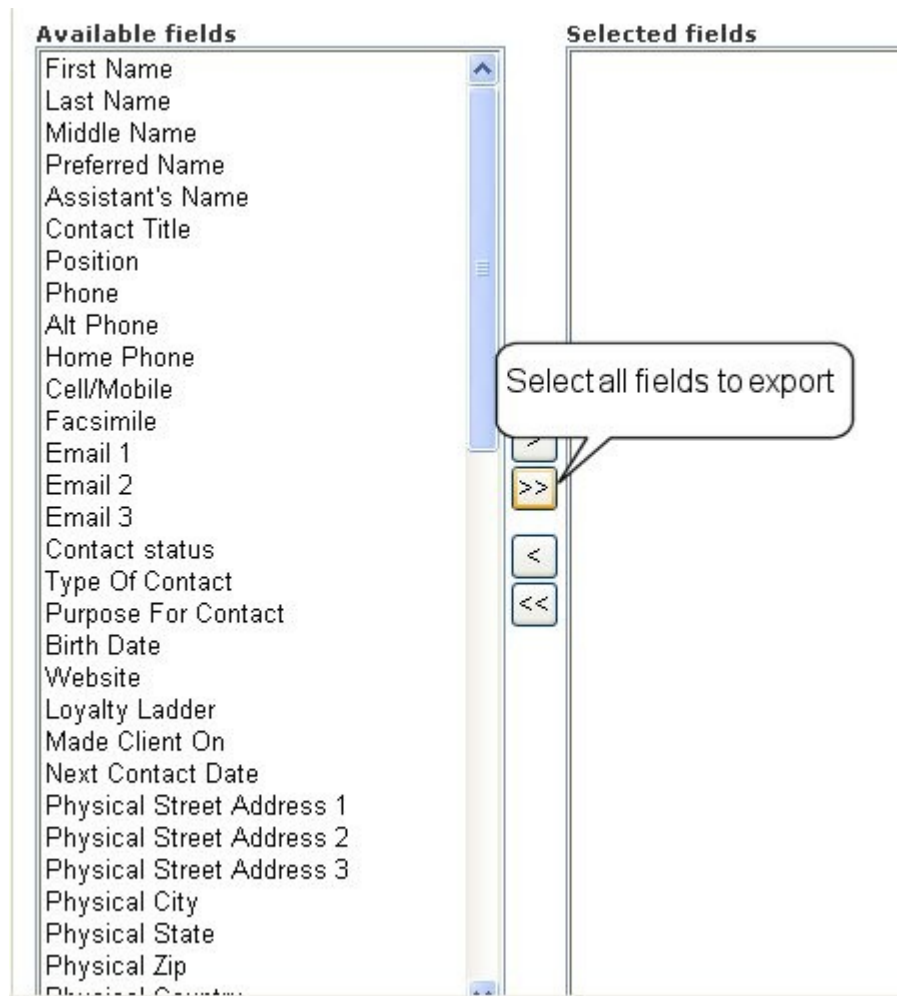


3. Now we need to start the export process by clicking on the "Export Contacts" link located at the left side of the screen.



4. In the export screen you need to export the fields you want to export from the system. You can choose to export all fields in the system or choose specific ones to export. To select individual fields select them and then click on the button with the ">" to move the selected

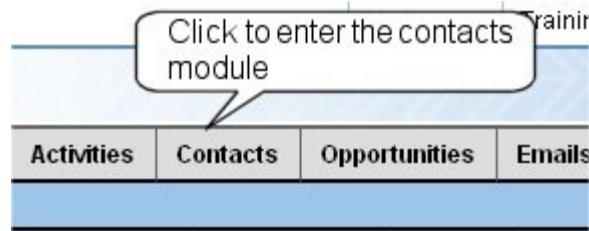
item to the selected fields list. To select all fields Click on the button with a ">>" on it.
(See screenshot below)



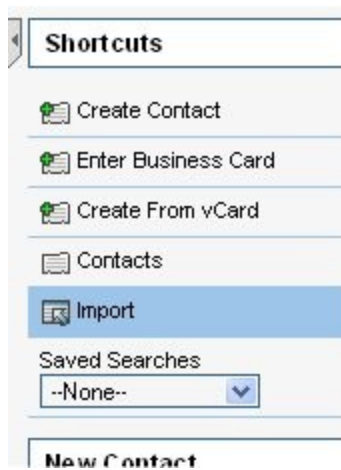
5. Click on the "Export to Excel Spreadsheet" button at the bottom of the screen. Save the file created.



6. Once the file has been downloaded, Logout from your MyActionCRM Account
7. Login to your ActionCoach CRM Account
8. Click on the Contacts button to enter the Contacts module (See screenshot below)

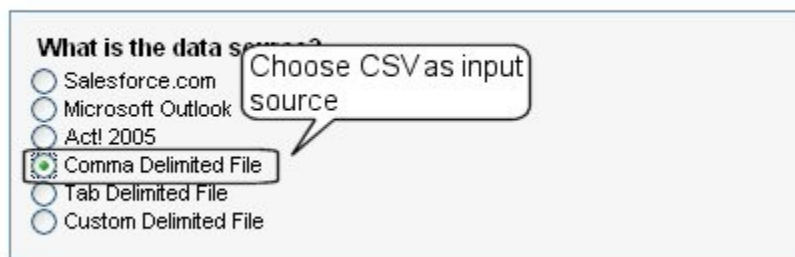


9. Click on the "Import" Link located at the left side of the screen to start the import process



10. Select "Comma Delimited File" as the source and click Next

Import Step 1: Select the Source



11. Browse for the file you downloaded in Step 5 and click next.

Import Step 2: Upload Export File

Many applications will allow you to export data into a **Comma Delimited text file (.csv)**.

1. Launch the application and Open the data file
2. Select the **Save As...** or **Export...** menu option
3. Save the file in a **CSV** or **Comma Separated Values** format

12. In Import Step 3 you need to map the fields from your import file to the correct fields in the ActionCoach CRM. i.e. you need to map First Name → First Name, Last Name → Last Name etc.

In the list below, select the fields in your import file that should be imported into each field in the system. When you are

Database Field	Header Row	Row 1	Row 2
First Name:	First Name	Paul	Greg
Last Name: *	Last Name	Branham	Clemens
-- Do not map this field --	Middle Name		
-- Do not map this field --	Preferred Name		
Accept Status	Assistant's Name		
Account ID:	Contact Title	Owner	
Account Name:	Position	Owner	
Alternate Address City:	Phone		
Alternate Address Country:	Alt Phone		
Alternate Address Postal Code:	Home Phone		
Alternate Address State:	Cell/Mobile		
Alternate Address Street 2:			
Alternate Address Street 3:			
Alternate Address Street:			
Assigned User Name:			
Assigned to:			
Assistant Phone:			
Assistant:			
Birthdate:			
Campaign ID			
Created by			
Date Created			

13. Once you finish mapping the fields, click on the "Import Now" button to finish the Import.

and Last Name when inserted into the database.
 or with the main Address Street Field when inserted into the

Import Now