

The Contact Importer requires CSV files that are formatted in the same manner as those created by the Matrix Contact Export. The field names must be specified on the first line of the file. Not all fields need to be included - **only name_first, name_last and email1 are mandatory.**

Export: This feature creates a CSV (opens in Microsoft Excel) file of your Contact's information. Simply select your Contacts and click the Export button to create the file.

Import: This feature Imports an existing CSV file into your Contacts on Matrix.

Important: Matrix has unique Field Names for each piece of information.

Example:

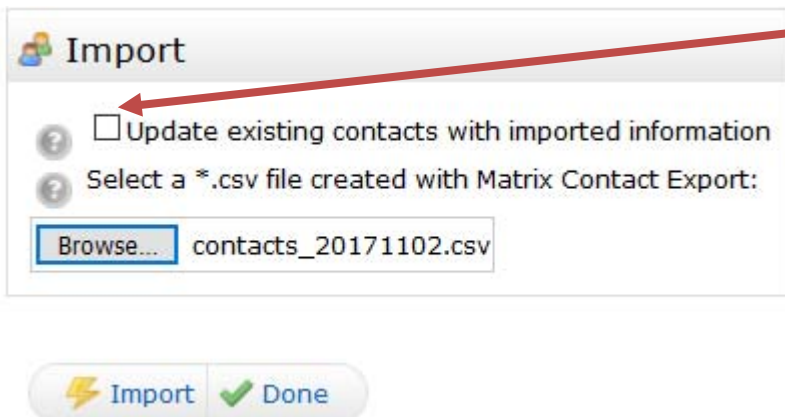
- name_first,
- name_last,
- email1

You must use the exact same Field Names in the CSV file you are Importing in order for Matrix to read the file and import the information correctly.

Click on **My Matrix, Contacts** and then the **Import** or **Export** button.

TIP: To Import Contacts more quickly, first use the Export feature to create a CSV file with the correct Field Names for each piece of Contact information. (or simply replace the field names with those listed on the next page and then import).

After the file is open on your computer, copy over any new or updated Contact information, save the document to your computer, and then upload the file back into Matrix.



Note: If this box is checked, Matrix will attempt to match each imported contact with an existing one, updating contact values when a match is found.

Leave unchecked if you want to allow duplicates to be created.

To skip the export and then import step, before uploading into Matrix, open up your spreadsheet and rename each field to the following. Then save as a CSV and import:

- Last name to: name_last
- First name to: name_first
- Middle name to: name_middle
- Title to: name_title (ex. Mr, Ms)
- Suffix to: name_suffix
- Spouse name to: name_spouse
- Home Street Addr to: addr_home_street For Business: addr_bus_street
- Home City to: addr_home_city For Business: addr_bus_city
- HomeState to: addr_home_state For Business: addr_bus_state
- Home Zip to: addr_home_zip For Business: addr_bus_zip
- Home Country to: addr_home_country For Business: addr_bus_country
- Company name: company_name
- Department: company_department
- Office: company_office
- JobTitle: profession
- Email: email1 & email2 & email3
- Website: www
- Home phone: telephone_home For Business: telephone_office
- Fax: telephone_fax
- Pager: telephone_pager
- Cell phone: telephone_mobile
- Other phone: telephone_other
- Notes: notes