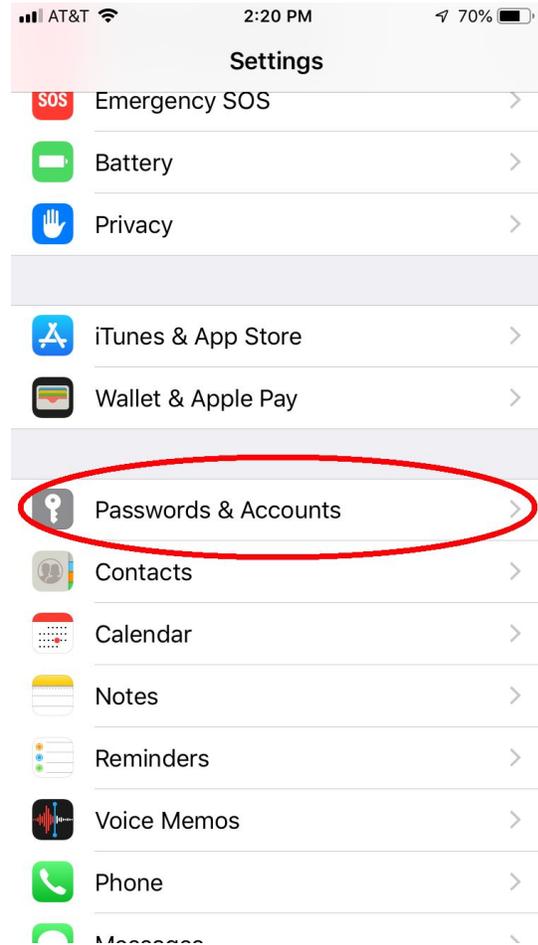
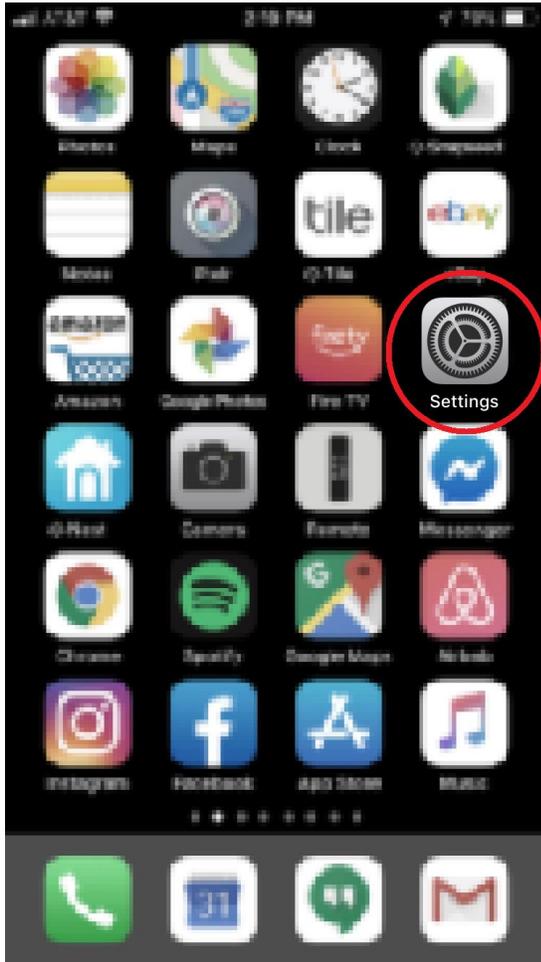


## Consolidating and Importing Contacts

It is important to consolidate your contacts from your iCloud account and personal email accounts to ensure adding a contact on your phone adds the contact to your synced email on your computer. After adding the contact to your phone you can quickly import that contact into ZAP as well for email marketing purposes, marketing mailers / labels, home search monitoring, and requesting your past clients to write you reviews to benefit your online presence.

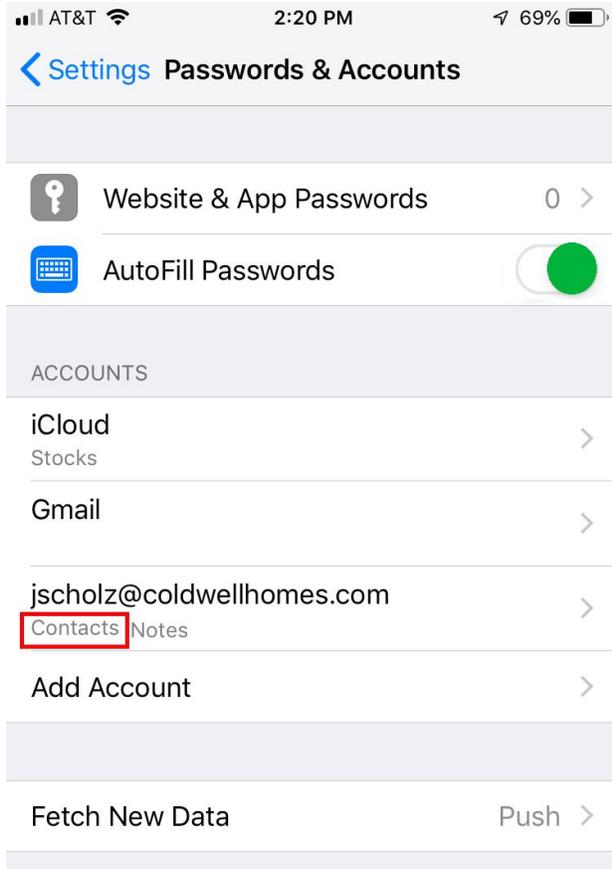
### Set your phone to sync your company contacts

If you have an iPhone: Check your phone for all email accounts and an iCloud login if you use an iPhone or iPad.



## Consolidating and Importing Contacts

Step 1: Go to SETTINGS -> PASSWORDS & ACCOUNTS -> Ensure that only your coldwellhomes.com account is syncing your contacts.



Step 2: (If you use an iPhone) Turn off iCloud and choose KEEP CONTACTS

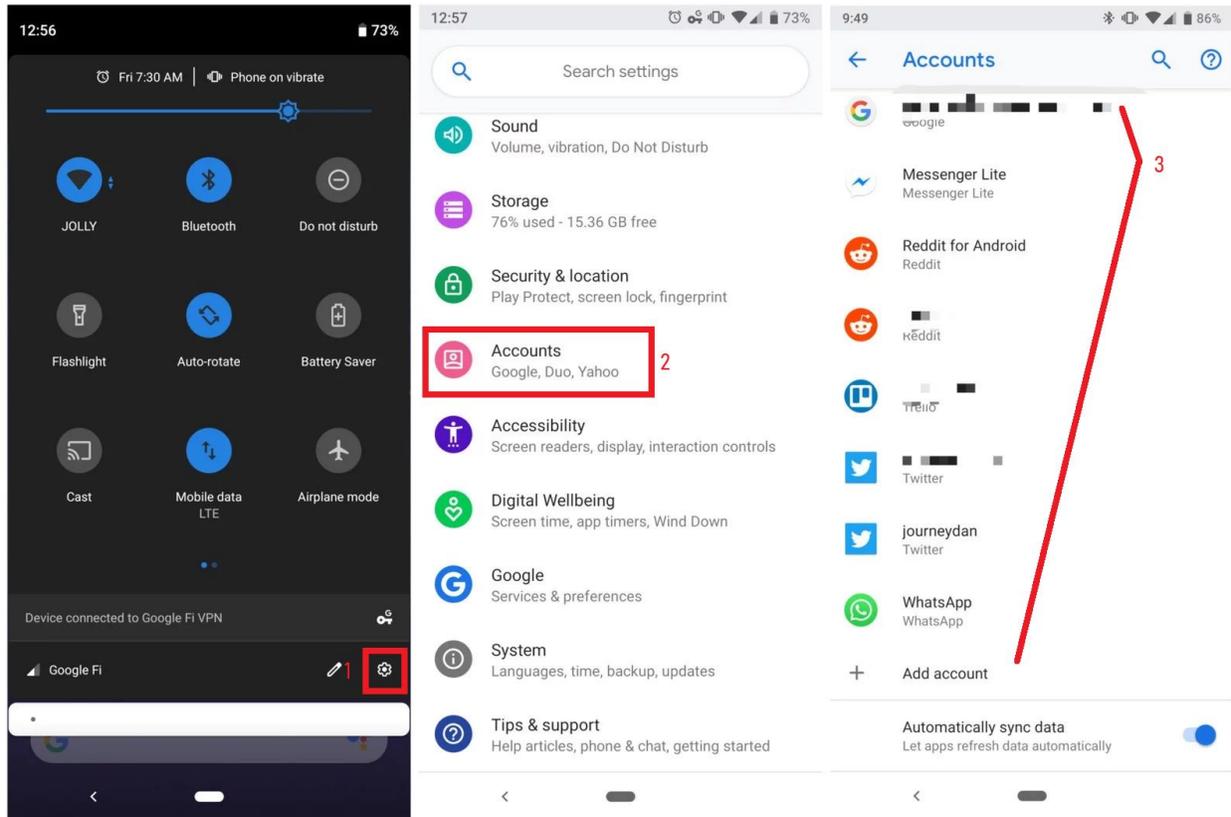
Step 3: (If you use an iPhone) Turn on iCloud if you use an iPhone contact syncing to ensure contacts that weren't uploaded have uploaded to iCloud

Step 4: (If you use an iPhone) Turn off iCloud contact syncing and choose to DELETE CONTACTS

Step 5: Ensure your Coldwellhomes.com account is the only account syncing contacts if you want all contacts to sync there.

## Consolidating and Importing Contacts

**If you have an ANDROID** - Check your phone for all syncing accounts  
Open your device's Settings app Settings -> Tap Accounts (If you don't see "Accounts," tap Users & accounts) -> Turn off the auto-sync for all besides your coldwellhomes.com account if that's where you want everything to sync.

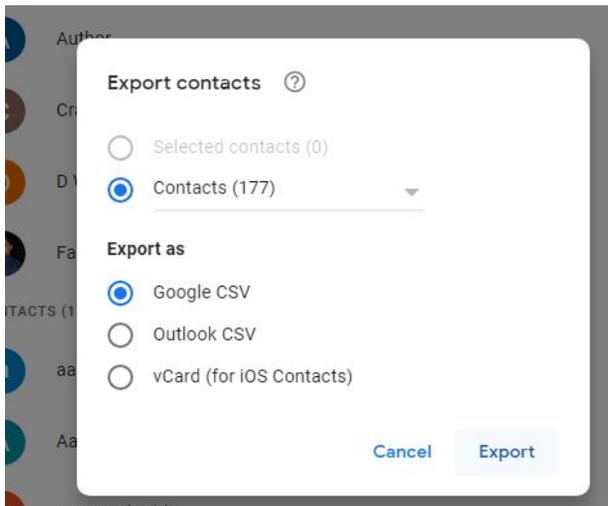
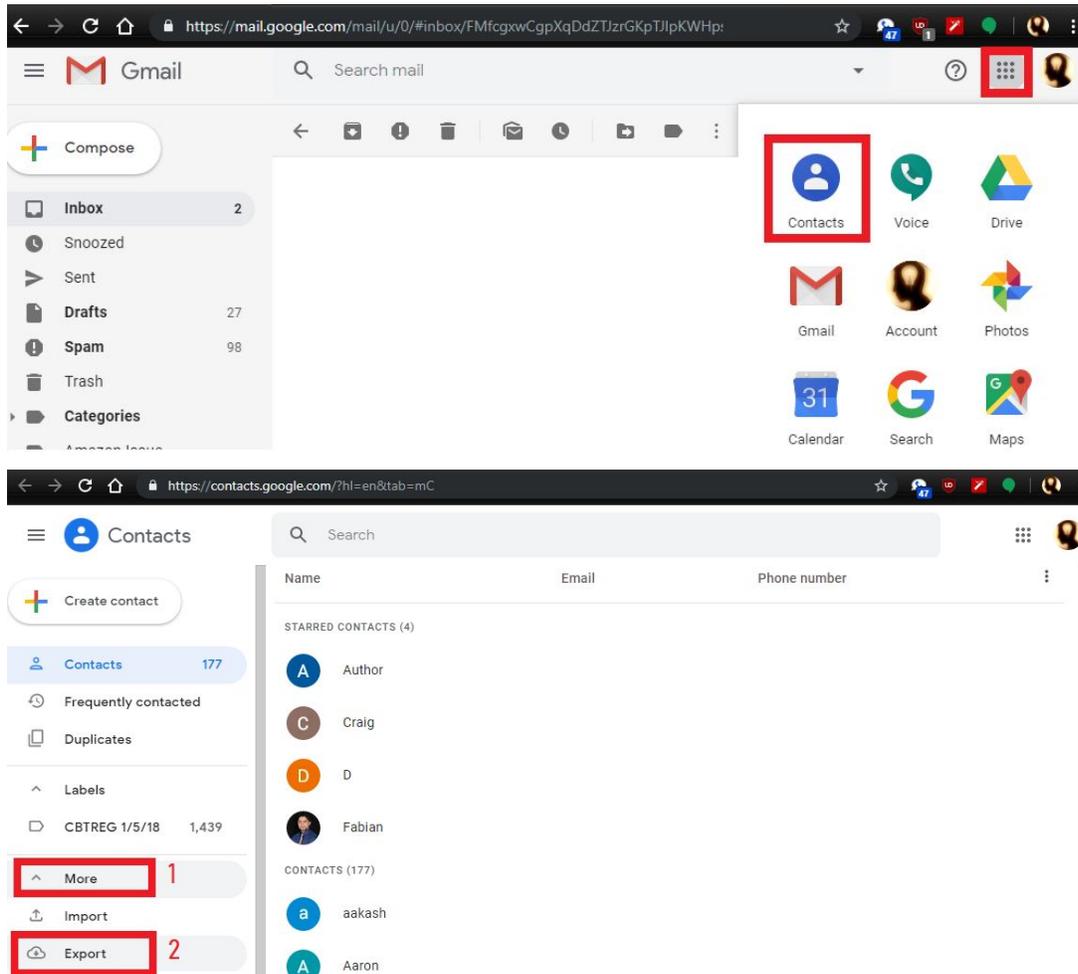


## Consolidating and Importing Contacts

### Export your contacts from all accounts on your computer

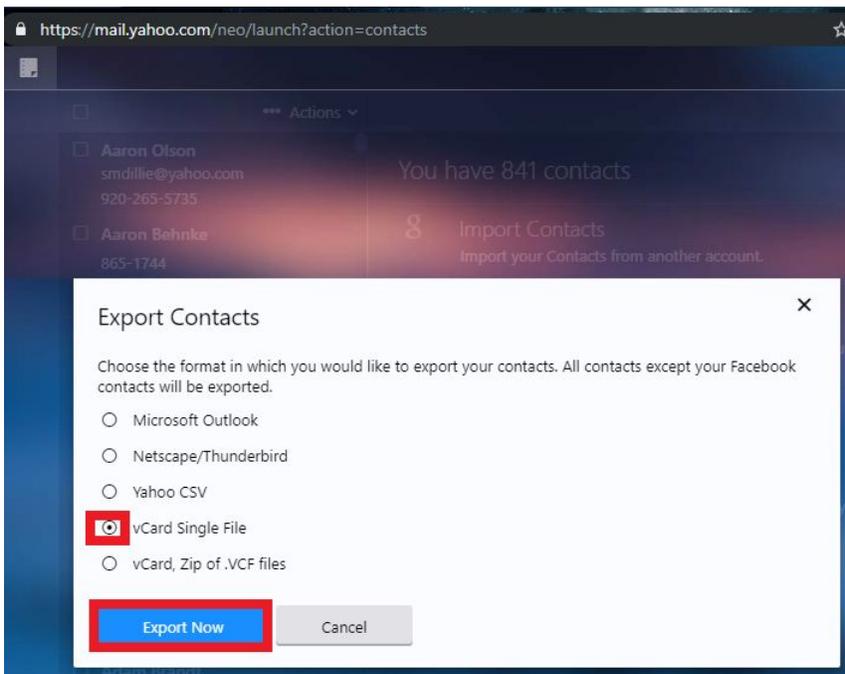
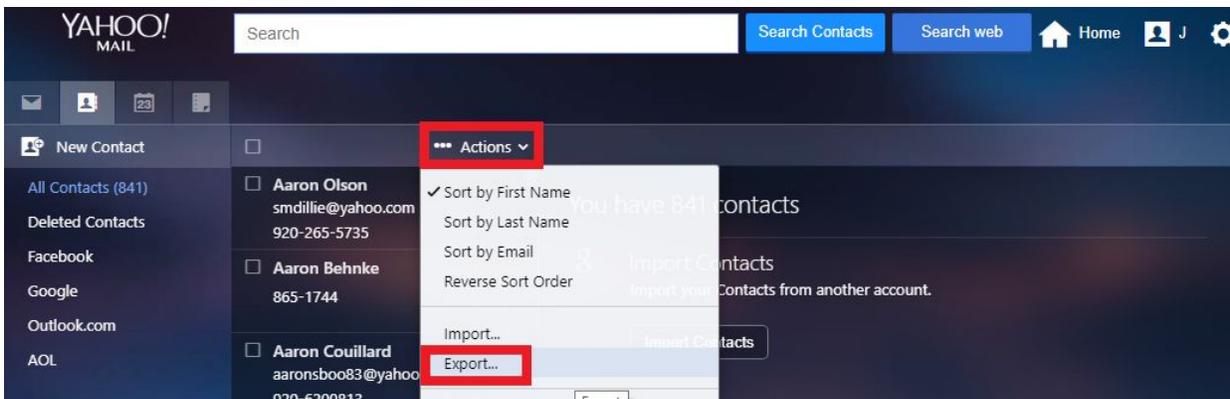
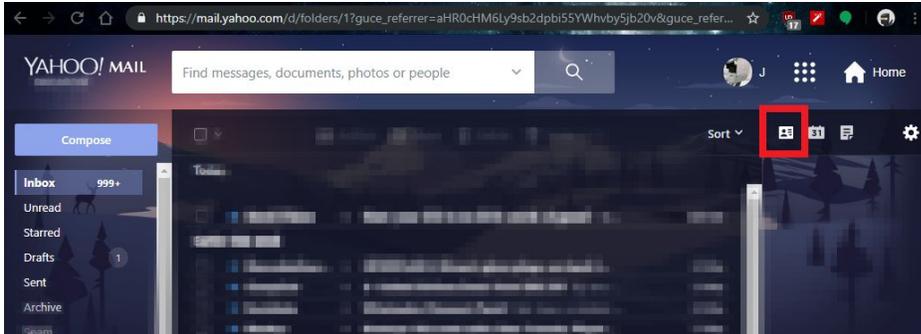
Step 6: Login to every email account on your computer and export the contacts. (Gmail, Yahoo, Hotmail, AOL, Top Producer, ect)

From your Personal Gmail account - Click Gmail -> Contacts -> Click More -> Click Export -> Select ALL CONTACTS -> Select Outlook CSV format -> Click Export



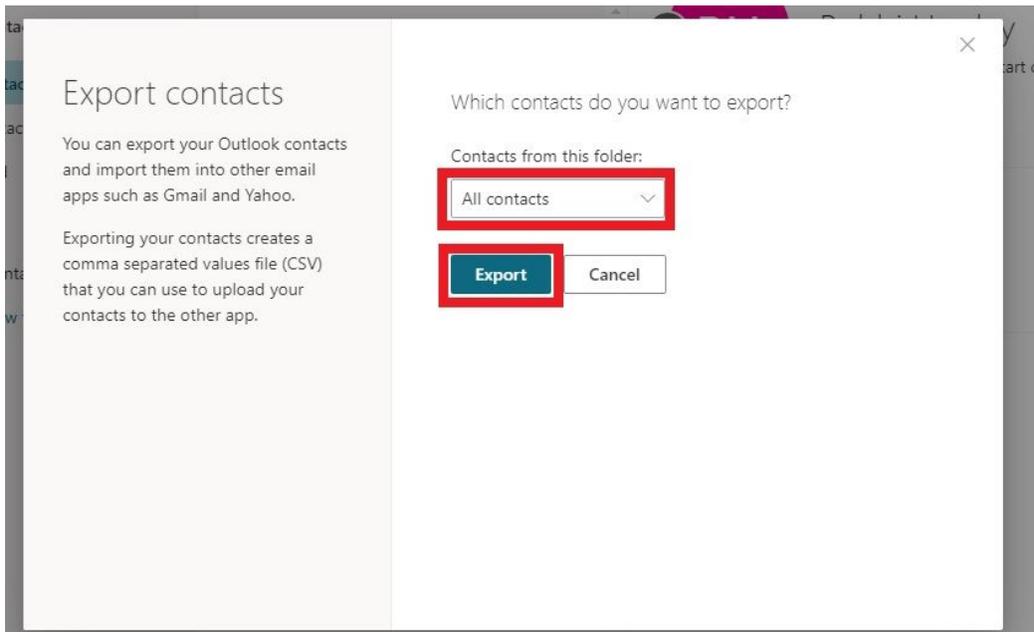
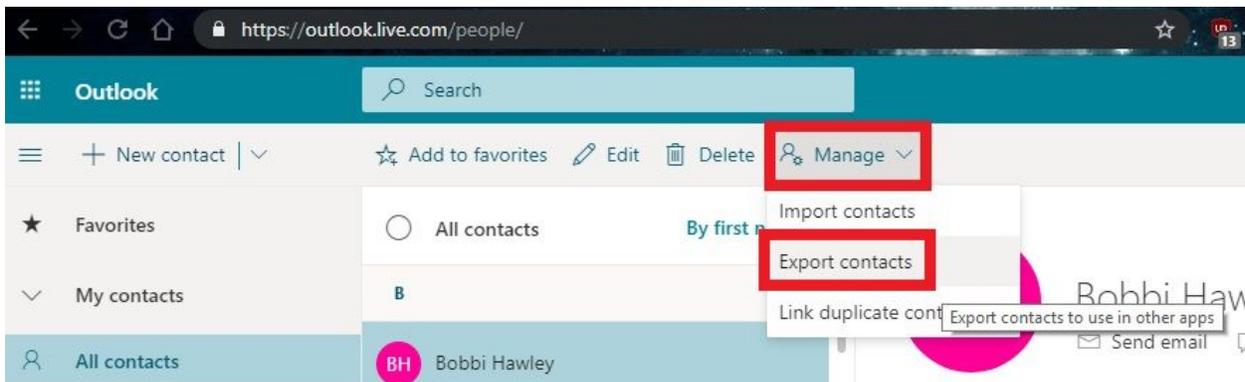
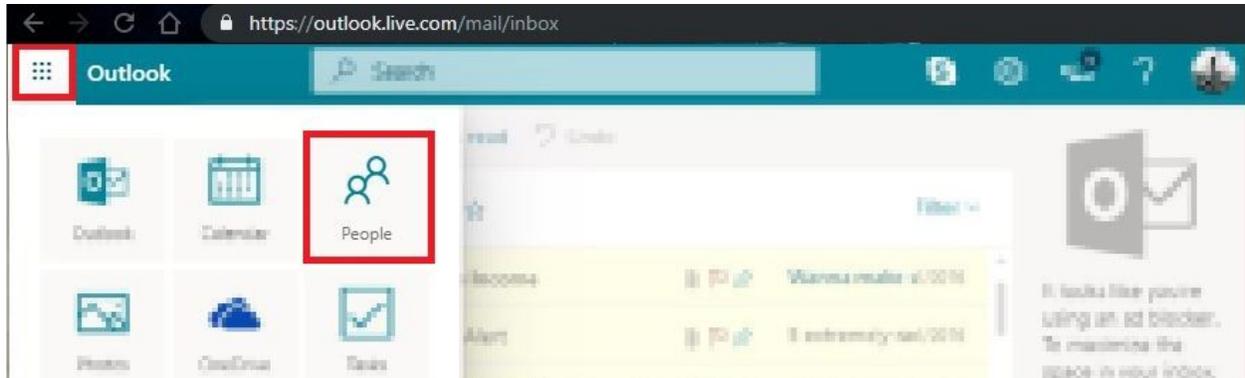
## Consolidating and Importing Contacts

**From your Yahoo account - Click Contacts -> Click More -> Click Export -> Select ALL CONTACTS -> Select Outlook CSV format -> Click Export**



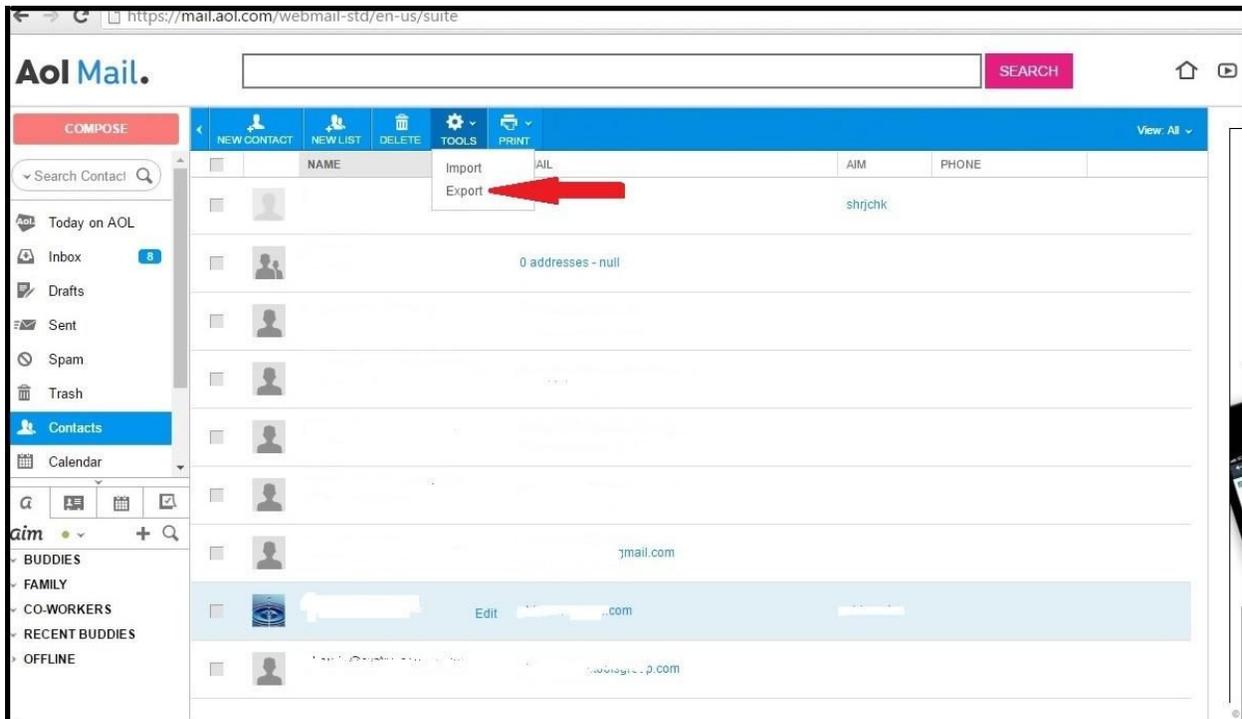
## Consolidating and Importing Contacts

**From your HOTMAIL account** - click the squares -> People -> MANAGE -> EXPORT CONTACTS -> Select ALL CONTACTS -> Click Export

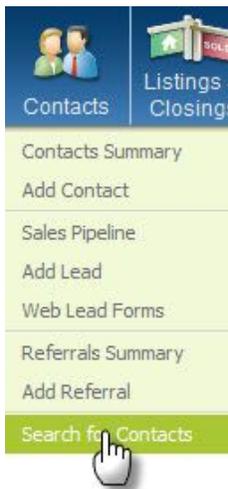


## Consolidating and Importing Contacts

**From your AOL Account** - Log in to AOL WebMail -> click CONTACTS -> click TOOLS and EXPORT -> Choose COMMA SEPARATED VALUE (CSV) -> Export -> Save the file to your computer.



**From your Top Producer Account** - Click SEARCH FOR CONTACTS from the Contacts menu in the main menu bar. -> Click SEARCH -> Click EXPORT CONTACTS -> Select ALL CONTACTS, CSV, and CONTACT RECORD AND ALL ASSOCIATED ITEMS and then EXPORT.



SEARCH RESULTS		
<input checked="" type="checkbox"/>	NAME	ADDRESS
<input checked="" type="checkbox"/>	Agent, Jim	10551 Shellbridge Way, Austin, TX
<input checked="" type="checkbox"/>	Agent, Tammy and Bob	1233 Main Street, Orlando, IL
<input checked="" type="checkbox"/>	Agent, Tina	10651 Shellbridge Way, Richmond, BC
<input checked="" type="checkbox"/>	Akins, Larry and Susan	726 5th Ave, Orlando, IL
<input checked="" type="checkbox"/>	Alanis, Jose and Helen	981 Betty Lane, Las Vegas, NV
<input checked="" type="checkbox"/>	Alba, Veronica	99 Beverly Park, Beverly Hills, CA
<input checked="" type="checkbox"/>	Alcala, Maria	1457 Cascade Court, Barrington, IL
<input checked="" type="checkbox"/>	Alex, Noel	1503 W 123rd St, Orlando, IL
<input checked="" type="checkbox"/>	Alexander, Barbara	510 Toberman Drive, Orlando, IL
<input checked="" type="checkbox"/>	Allen, Gene and Kelly	1233 View St, Orlando, IL
<input checked="" type="checkbox"/>	Archer, Craig and Susan	239 Degnan Blvd, Azalea Park, IL
<input checked="" type="checkbox"/>	Baca, Betty	18 Vermont Ave S, Azalea Park, IL
<input checked="" type="checkbox"/>	Bahena, Christy	22698 Fraser St, Los Angeles, IL
<input checked="" type="checkbox"/>	Bailey, Bill	691 N Butte Drive, Orlando, IL

Mass Open | Email | Schedule Activity | Mass Update | **Export Contacts** | Create Report | More Options

## Consolidating and Importing Contacts

### EXPORT CONTACTS

I want to export...  Selected Contacts  
 All Contacts

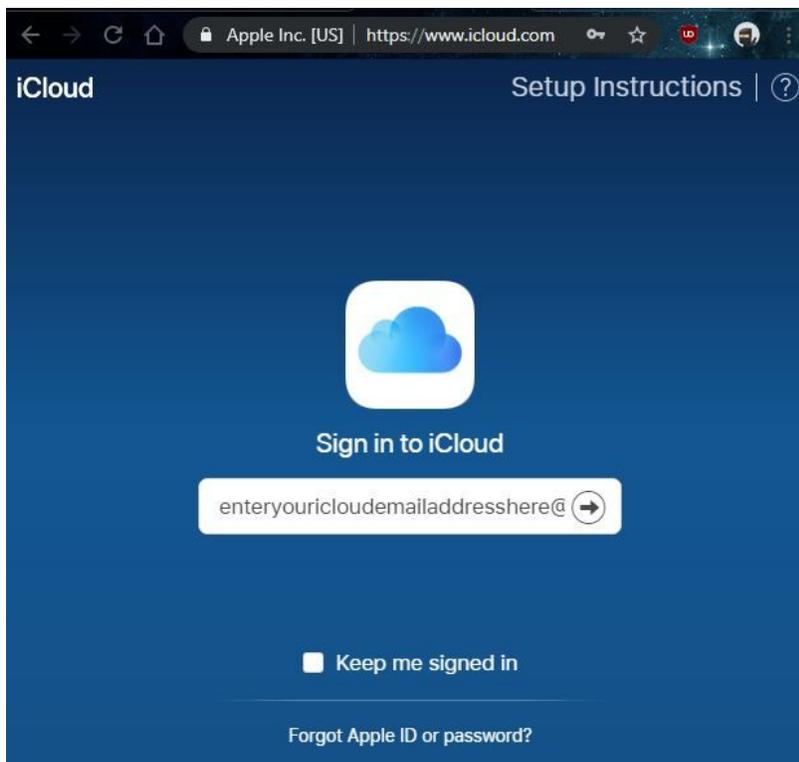
Export Contacts To  CSV  
 MailChimp  
 BombBomb

Export Options  Contact record (names only)  
 Contact record and all addresses and communications  
 Search results columns only  
 Contact record and all associated items  
 Mailing list (mailing address and salutation info)  
 Email list (email addresses and salutation info)  
 Key contact details (name, address, email & phone)  
 Contact record information for Facebook import  
 Contact record information for Realsuite import

Want to see the list of fields included in each option? [Show me](#)

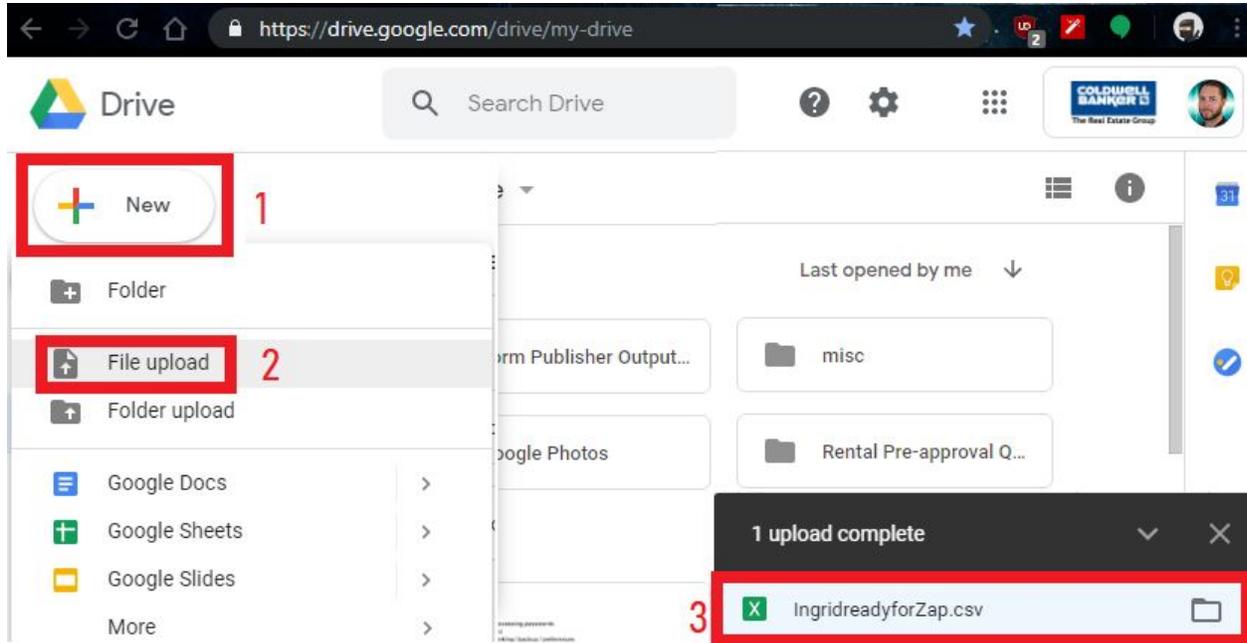
Did you know you can send your Top [Set this up now!](#)

Step 7: (If you use an iPhone) Login to iCloud.com with your Apple ID and Password and export your contacts as an ICF file.



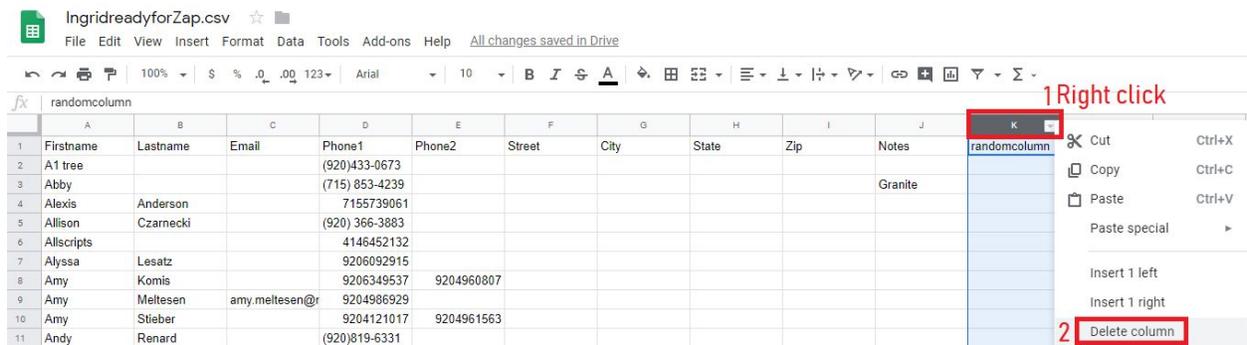
## Consolidating and Importing Contacts

Step 8: Upload each of the CSV files to Google Drive, open them and remove unneeded columns.

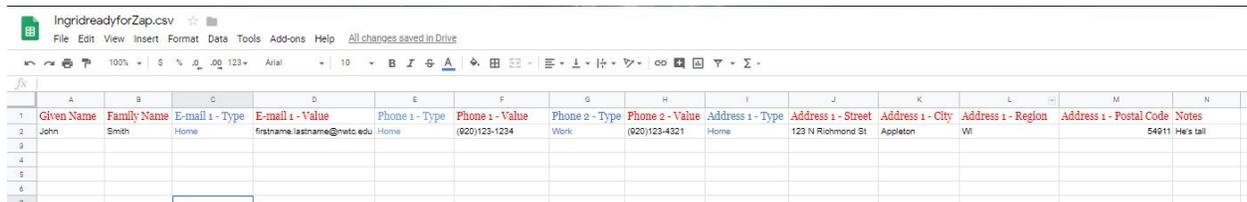


Step 9: Edit and remove / rename all columns to be the following (We recommend you copy and paste / replace as follows:

Given Name, Family Name, E-mail 1 - Type, E-mail 1 - Value, Phone 1 - Type, Phone 1 - Value, Phone 2 - Type, Phone 2 - Value, Address 1 - Type, Address 1 - Street, Address 1 - City, Address 1 - Region, Address 1 - Postal Code, Notes



It should look like this when you're done:



## Consolidating and Importing Contacts

### Step 10: Export your edited contacts CSV files

Contacts

Create contact

Contacts 177

Frequently contacted

Duplicates

Labels

CBTREG 1/5/18 1,439

More 1

Import

Export 2

Name Email Phone number

STARRED CONTACTS (4)

- Author
- Craig
- D
- Fabian

CONTACTS (177)

- aakash
- Aaron

Export contacts

Selected contacts (0)

Contacts (177)

Export as

Google CSV

Outlook CSV

vCard (for iOS Contacts)

Cancel Export

## Consolidating and Importing Contacts

Step 11: Import all of your contacts into GSuite - Navigate to Google Contacts -> Click MORE -> Click IMPORT -> Select one of the ICF or cleaned up CSV files you exported earlier and IMPORT

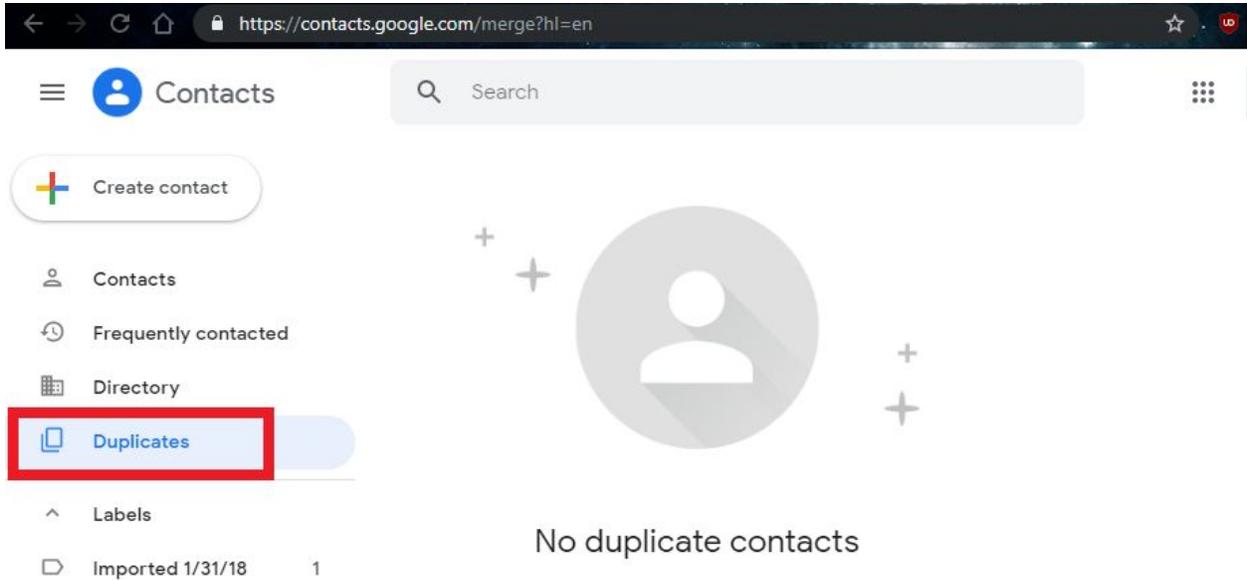
The screenshot shows the Google Contacts web interface. On the left sidebar, the 'More' button is highlighted with a red box and labeled with a red '1', and the 'Import' button is also highlighted with a red box and labeled with a red '2'. The main area displays a list of contacts with columns for Name and Email.

Name	Email
CONTACTS (586)	
A.J. McCaskey	amccaskey@coldwellhomes.com
Accounting Department	acct@coldwellhomes.com
Adam Adler	aadler@coldwellhomes.com
Alexander Oberthaler	dgritt@coldwellhomes.com
Ame Prunick	aprunick@coldwellhomes.com
Amy Bielen	abielen@coldwellhomes.com

The screenshot shows the 'Import contacts' dialog box. It contains the text: 'Import contacts', 'To import contacts, select a CSV or vCard file. [Learn more](#)', a blue 'Select file' button, the filename 'IngridContactsRevised.csv', and 'Cancel' and 'Import' buttons at the bottom right.

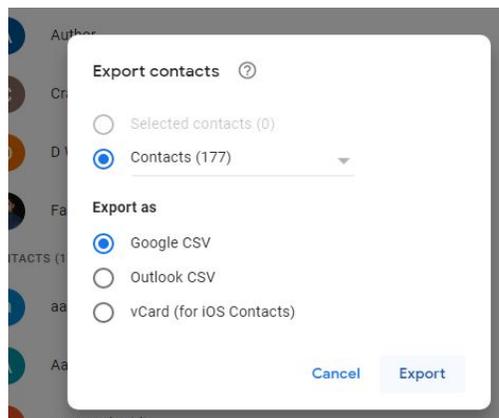
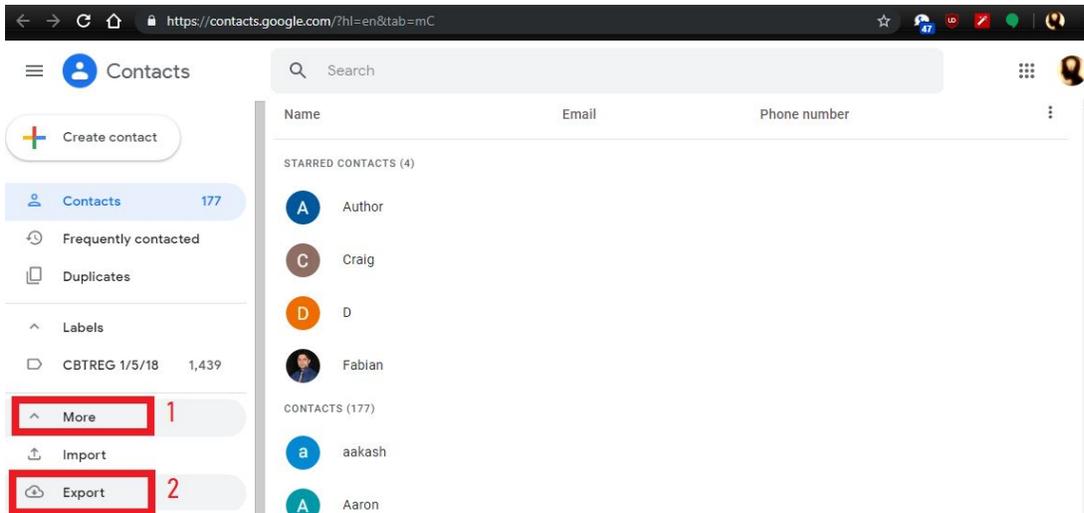
## Consolidating and Importing Contacts

Step 12: Run Find and Merge Duplicate Contacts in your Coldwellhomes.com Gsuite account.



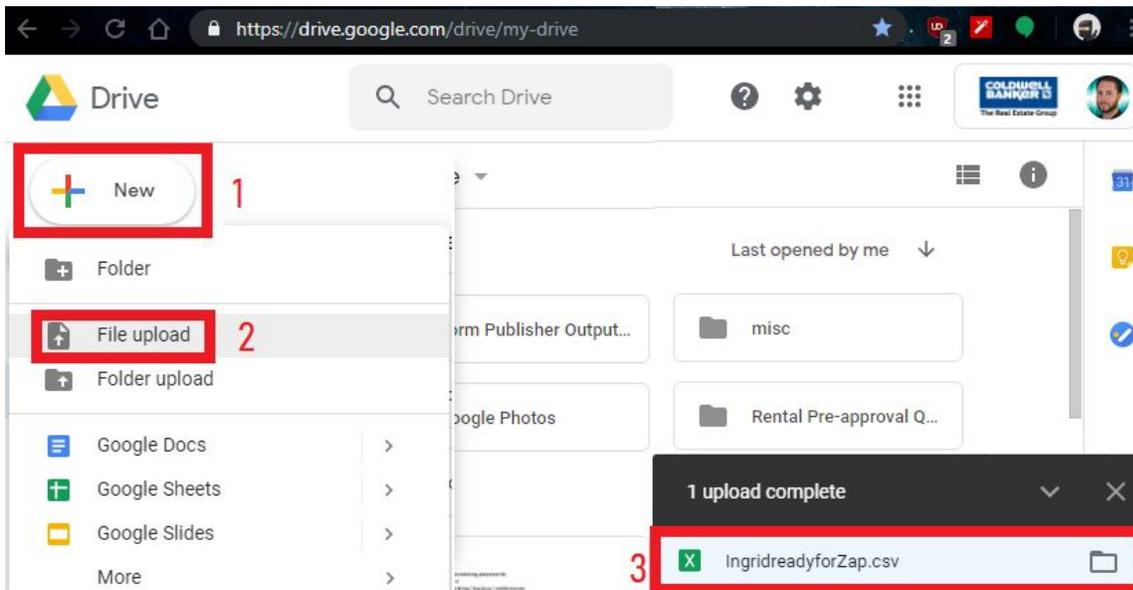
## Export and Cleanup your CSV Contact Export and prepare it for import to ZAP

Step 13: Export contacts from Gsuite as a CSV file.

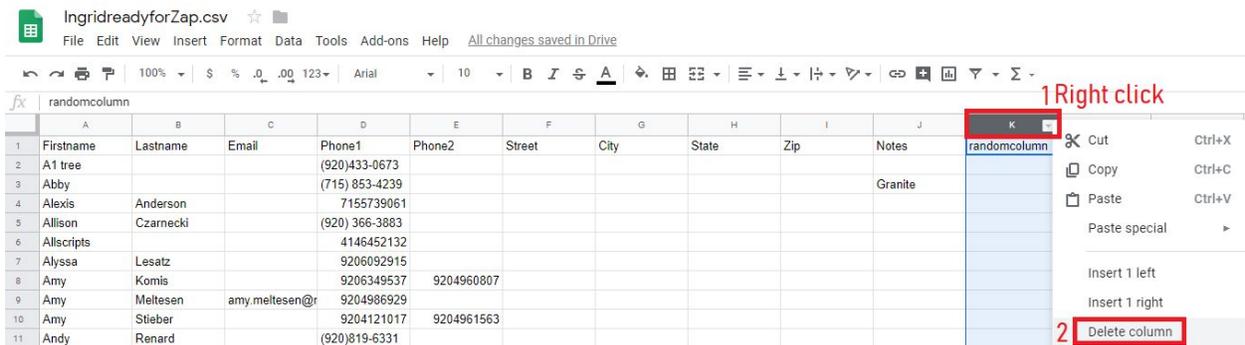


## Consolidating and Importing Contacts

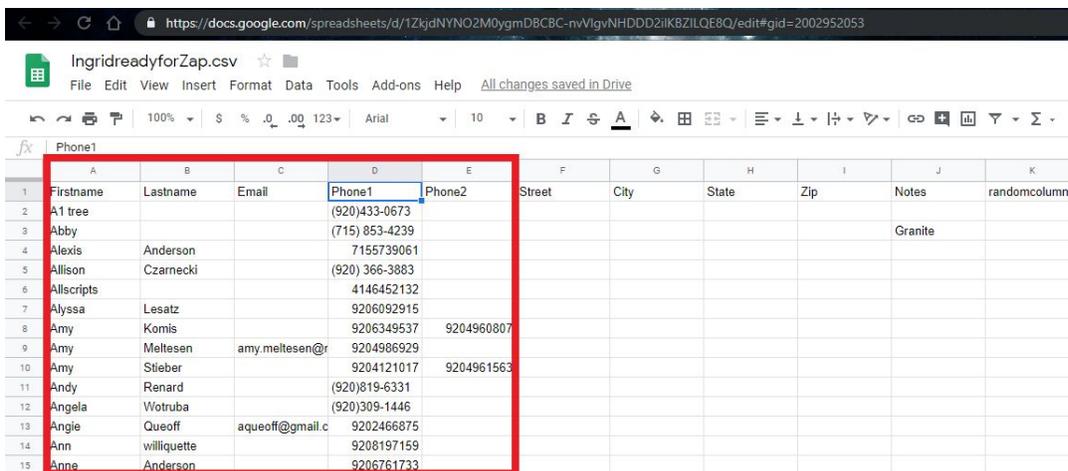
Step 14: Upload your CSV files to Google Drive and convert to Google Sheets by clicking the file once its uploaded.



Step 15: Edit and remove / rename all columns to be only First Name, Last Name, Email, Phone 1, Phone 2, Address, State, City, Zipcode, and Notes.



Step 16: Ensure all contacts have a first and last name, email address or phone number.



## Consolidating and Importing Contacts

Step 16: Find and Replace all special characters including the following characters ,;)(#'

The screenshot shows a Google Sheet titled 'IngridreadyforZap.csv'. The 'Edit' menu is open, and the 'Find and replace...' option is selected. A dialog box titled 'Find and replace' is displayed. The 'Find' field contains a comma character, and the 'Replace all' button is highlighted with a red box. The spreadsheet data is visible in the background, showing columns for Phone1, Phone2, Street, City, State, Zip, and Notes.

	D	E	F	G	H	I	J
1	Phone1	Phone2	Street	City	State	Zip	Notes
2	(920)433-0673						
3	(715) 853-4239						
4	7155739061						
5	(920) 366-3883						
6	4146452132						
7	9206092915						
8	9206349537	9204960807					
9	9204986929						
10	9204121017	9204961563					
11	(920)819-6331						
12	(920)309-1446						
13	9202466875						
14	9208197159						
15	9206761733						
16	9205442130						
17	9206191121						
18	18002882020	(920)562-9587					
19	9206766481						
20	(920)264-7838						
21	(920)737-4909						
22	9202884030	9202884030					
23	(920)405-3770						
24	9205624560						
25	9207374797						

Step 17: Save and Export your CSV File

The screenshot shows the same Google Sheet. The 'File' menu is open, and the 'Download as' option is selected. A sub-menu is displayed, showing various export options. The 'Comma-separated values (.csv, current sheet)' option is highlighted with a red box. The spreadsheet data is visible in the background, showing columns for Phone1, Phone2, Street, and City.

	C	D	E	F	G
1	Phone1	Phone2	Street	City	
2	(920)433-0673				
3	(715) 853-4239				
4	7155739061				
5	(920) 366-3883				
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17					

## Consolidating and Importing Contacts

### Import your CSV File to ZAP

Step 18: Login to Zap and choose CONTACTS -> NEW CONTACT -> IMPORT CONTACTS -> UPLOAD A CSV FILE -> Select the appropriate columns -> IMPORT

The screenshot shows the Zap CRM dashboard for user Kathy. The top navigation bar includes the Zap logo, a search bar, and a '+ Add' button. The left sidebar lists navigation options: Dashboard, Contacts (with a '2' notification badge), Business, Manage, Reporting, ZapStore, Quick Links, REScoreboard, and Support. The main content area is titled 'Dashboard' and features a welcome message: 'Welcome, Kathy! Here's what you need to tackle today.' Below this is a row of five metric cards, each showing a '0' value: Requests, New Leads, Meetings, Reminders, and Updates Due. A 'Zap News' section follows, with a 'View All Zap News' link. Three news items are displayed: 'Zap Updates: Bulk Up!' by Ashley Salazar (6 h, 1 comment), 'Open house ideas your customers will love' by Christine Ned... (20 h, 0 comments), and 'Millennials are in the homeowner game' by Matt Felzke (Oct 18, 2 comments).

Step 19: Select appropriate columns for each column and click IMPORT.