

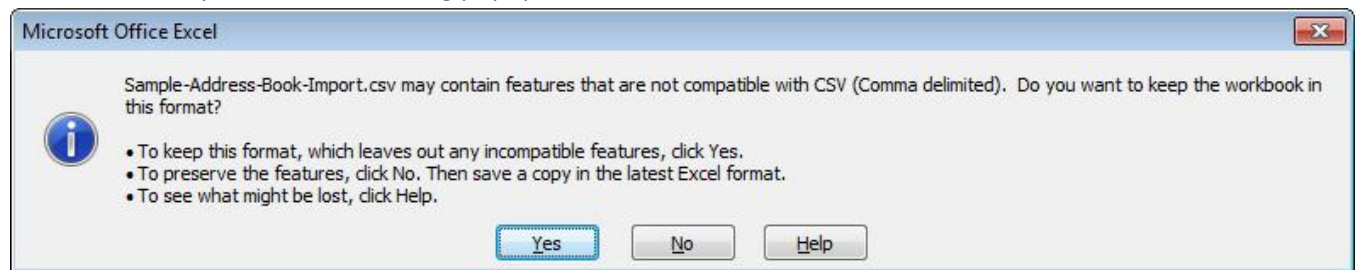
Import Contacts

1. Prepare your contacts in Microsoft Excel based on the following format and **DO NOT** delete any columns:

No.	First Name	Last Name	Title	Category	Organisation	Address 1	Address 2	City	Postcode	Mobile No	e-mail
1	Joyce	Tan	Ms	Basket	eHome	25A, TTDI		KL	60000	60121234567	info@eh.net
2	Ben Lo	Lo	Mr	Legal	Hi-Corp	2, Jalan Ru		Seremban	48000	60167654321	ben@corp.com
3	Mohd Ali		En	Food	LLJ S/B	3, Jalan PJS		PJ	47301	60192221111	ali@myco.com

Note: You may specify the full name under the 'First Name' column and leave the 'Last Name' blank.

2. Click 'Save as' in Microsoft Excel, type in your file name and change the 'Save as type' to 'CSV (Comma delimited) (*.csv)' to save the file in CSV format.
3. Click 'Yes' if you see the following popup:



Note: You may also export your contacts from Microsoft Outlook, Microsoft Access, Outlook Express, etc but make sure the contacts are saved in CSV format.

4. To import the contacts to ECHO, click the 'Address Book' icon from the top menu (refer to Figure 2.1.1).
5. Click 'CSV-Import' from the left menu (refer to Figure 2.14.5).



Figure 2.14.5

6. Click 'Browse' to select the CSV file (refer to Figure 2.14.6).

Figure 2.14.6

- Click 'Import'.

CSV-Fieldname	Addressbook-Fieldname
No.	none
Name	Full Name
Title	Title
Category	Category: id or name, comma separated list
Organisation	Company
Address 1	Street (Business)
Address 2	Address Line 2 (Business)
City	City (Business)
Postcode	ZIP Code (Business)
Mobile No	Mobile Phone
e-mail	E-mail (Business)

Import Cancel

Start record to import 1

Number of records to import from file. (Leave it blank to import all)

☒ Test Import (show importable records only in browser)

Figure 2.14.8

- Click on the drop down boxes to match the fields accordingly (refer to Figure 2.14.8 – item 8).
- Start record:** This field defines the first line in your CSV file to start importing. For example, if you would like to omit the column header in your CSV file and start importing from line two onwards, then type '2' in this field (refer to Figure 2.14.8 - item 9).
- Number of records to import from file:** This field defines the number of records to import from the CSV file. For example, if your CSV file has one hundred records and you would like to import records 1 – 50, then type in '50' in this field (refer to Figure 2.14.8 – item 10). If you would like to import all the records in your CSV file, leave this field blank.
- Test Import:** Click to check this field if you only want to test the import without importing the records to the system. Uncheck this field if you want to import the records into the system (refer to Figure 2.14.8 – item 11).
- Click 'Import' to start the import or click 'Cancel' to cancel the import.

Note: If you import X number of contacts into ECHO now, then in the future when you want to import additional Y number of contacts into ECHO, you just have to create a new CSV file with only the new Y number of contacts and import the file into ECHO.