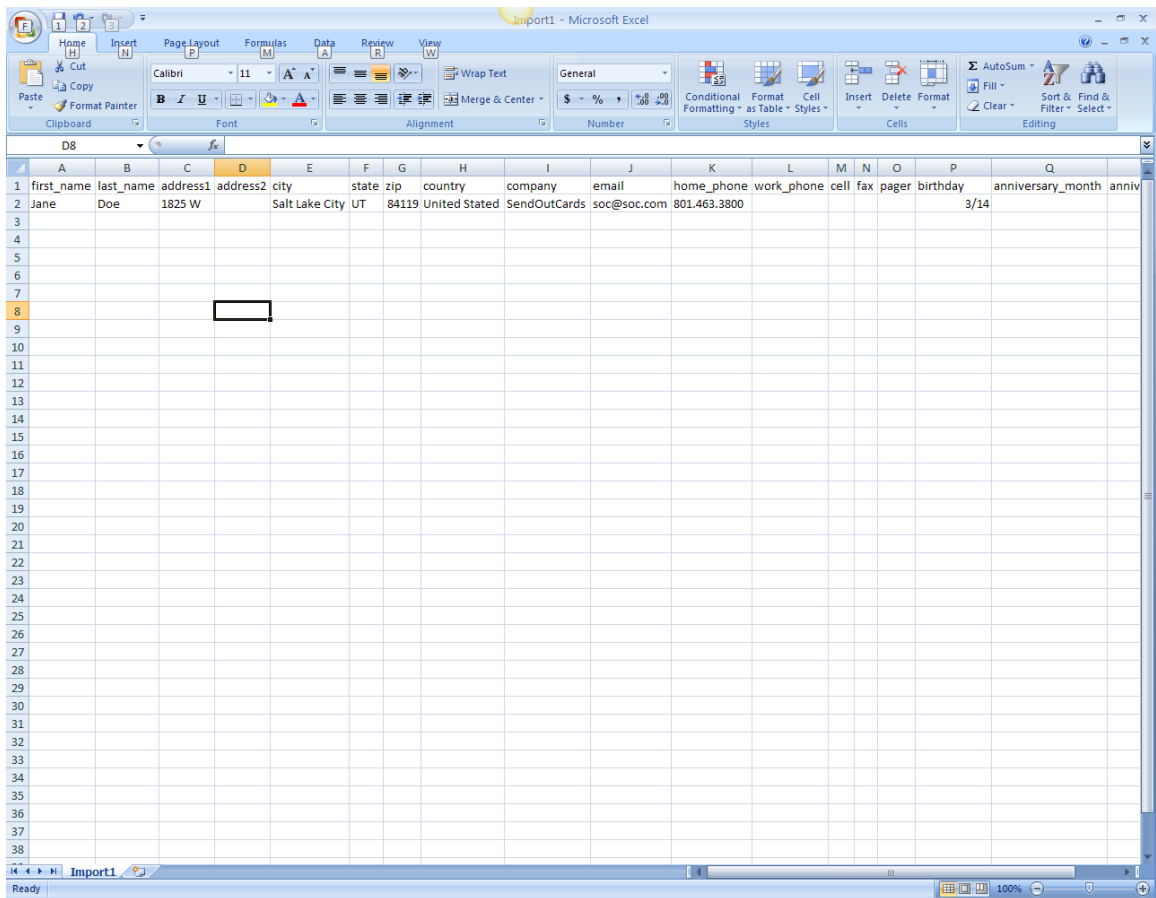


Importing Contacts into your Contact Manager Before You Get Started:

On your Excel file, you will need to have a separate heading for each different field of information. For example, the first name and last name of a contact **MUST** be in separate columns to work correctly with the SendOutCards system.

The required fields in SendOutCards that you will want to have a column for in your spreadsheet is First Name, Last Name, Address, City, State, Zip/Postal Code and country.

You may also add birthday or anniversary's in a column as well. The proper date format would be 3/14, for a person's birth date of March 14.



The screenshot shows a Microsoft Excel spreadsheet with the following columns: first_name, last_name, address1, address2, city, state, zip, country, company, email, home_phone, work_phone, cell, fax, pager, birthday, anniversary_month, and anniversary_day. The first row of data contains: Jane, Doe, 1825 W, Salt Lake City, UT, 84119, United States, SendOutCards, soc@soc.com, 801.463.3800, and 3/14. The spreadsheet is titled 'Import1 - Microsoft Excel'.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	
1	first_name	last_name	address1	address2	city	state	zip	country	company	email	home_phone	work_phone	cell	fax	pager	birthday	anniversary_month	anniv
2	Jane	Doe	1825 W		Salt Lake City	UT	84119	United States	SendOutCards	soc@soc.com	801.463.3800					3/14		
3																		
4																		
5																		
6																		
7																		
8																		
9																		
10																		
11																		
12																		
13																		
14																		
15																		
16																		
17																		
18																		
19																		
20																		
21																		
22																		
23																		
24																		
25																		
26																		
27																		
28																		
29																		
30																		
31																		
32																		
33																		
34																		
35																		
36																		
37																		
38																		

If you would like to import your contacts into a specific group in your Contact Manager you must **FIRST** create the group in SendOutCards. From the Card Manager Main Menu, click Contacts then Groups.



Go to the Main Menu, then Contacts and select Groups.

The screenshot shows the SendOutCards website interface. At the top, the logo "SendOutCards" is displayed with the tagline "Changing Lives... One Card at a Time". A navigation bar includes links for Home, Main Menu, Cards, Gifts, Contacts, Pictures, Distributor, Help, and Account. The "Main Menu" is expanded, showing options like "Administrative Tasks (old)", "SendOutCards", "Create A Card", "Create A Campaign", "Upload Pictures", and "Add New Contact". The "Contacts" dropdown menu is open, highlighting "Groups" and including options for "Add New Contact", "Calendar", "Dated Notes", "Find A Contact", and "Import". Below the navigation, there are sections for "Account" (Points: 22, Expense: \$82.72), "Cards Sent", "Eagle's Challenge Points", and "Personal" information (Default Return Address). A "Reminders" section is also visible. At the bottom, there are promotional banners for "Next Event" (TREAT'EM RIGHT), "SOC TV", "Eagle's Challenge", and "Recognition".

In Groups, type in your new group name and click "Add Group."

The screenshot shows the "Groups" page on the SendOutCards website. The page header includes the logo and tagline. A navigation bar shows "Home" and "Main Menu". A welcome message reads "Welcome, Brandon Comstock (ID: 48318)". Below this, the text "Your Groups are Listed Below." is displayed. A table titled "Existing Groups" lists several groups with "Edit" and "Remove" links for each. Below the table is an "Add New Group" section with a "New Upload" input field and an "Add Group" button. A McAfee SECURE logo is visible in the bottom right corner.

Existing Groups		
Group Name	Edit	Remove
Christmas	Edit	Remove
Christmas 09	Edit	Remove
Distributors-Customers	Edit	Remove
Missing Info	Edit	Remove
SOC people	Edit	Remove

Add New Group
New Upload



You will get the message "Group added successfully" and the new group will show up under Existing Groups.

The screenshot shows the SendOutCards website interface. At the top left is the logo "SendOutCards" with a red envelope icon. To its right is the tagline "Changing Lives... One Card at a Time". Below the logo is a red navigation bar with "Home" and "Main Menu" links. The main content area displays a welcome message: "Welcome, Brandon Comstock (ID: 48318)". Below this is a green notification box that says "Group added successfully.". Underneath the notification is a table titled "Existing Groups". The table has three columns: "Group Name", "Edit", and "Remove". It lists six groups: "Christmas", "Christmas 09", "Distributors-Customers", "Missing Info", "New Upload", and "SOC people". Each row has "Edit" and "Remove" links. Below the table is a section titled "Add New Group" with a text input field and an "Add Group" button. In the bottom right corner, there is a "McAfee SECURE" logo with the text "TESTED DAILY 10-MAY".

SendOutCards® *"Changing Lives... One Card at a Time"*

Home Main Menu

Welcome, Brandon Comstock (ID: 48318)

Group added successfully.

Group Name	Edit	Remove
Christmas	Edit	Remove
Christmas 09	Edit	Remove
Distributors-Customers	Edit	Remove
Missing Info	Edit	Remove
New Upload	Edit	Remove
SOC people	Edit	Remove

Add New Group

Add Group

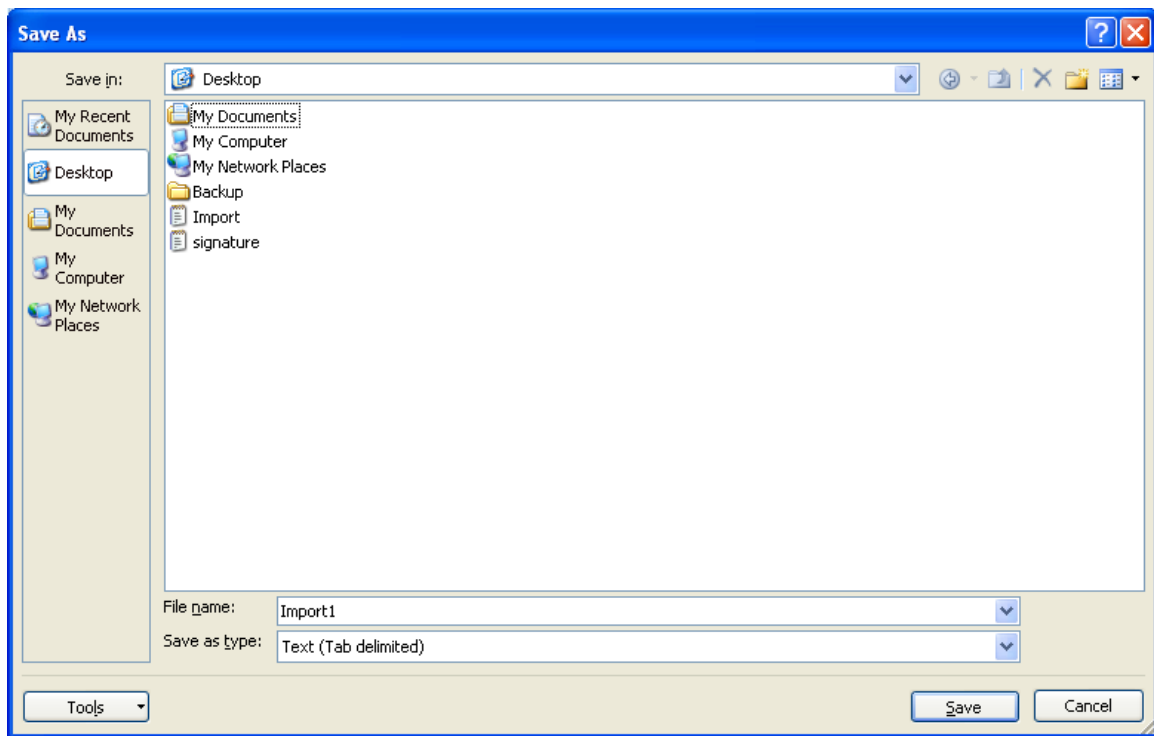
McAfee SECURE
TESTED DAILY 10-MAY



Next to every contact name you will need to have the group name. It is important that this matches the group name that you have in your Contact Manager. For example, if you added a group in your Contact Manager and named it "New Upload", you must type in "New Upload" for the group name in your spreadsheet. If you do not have the group in your Contact Manager the contacts will be imported into the "Unassigned" group. It is recommended that you copy and paste the group name from SendOutCards into those fields.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	Group	first_name	last_name	address1	address2	city	state	zip	country	company	email	home_phone	work_phone	cell	fax	pager	birthday	anniversary_mon
2	New Upload	Jane	Doe	1825 W		Salt Lake City	UT	84119	United Stated	SendOutCards	soc@soc.com	801.463.3800						3/14
3																		
4																		
5																		
6																		
7																		
8																		
9																		
10																		
11																		
12																		
13																		
14																		
15																		
16																		
17																		
18																		
19																		
20																		
21																		
22																		
23																		
24																		
25																		
26																		
27																		
28																		
29																		
30																		
31																		
32																		
33																		
34																		
35																		
36																		
37																		
38																		

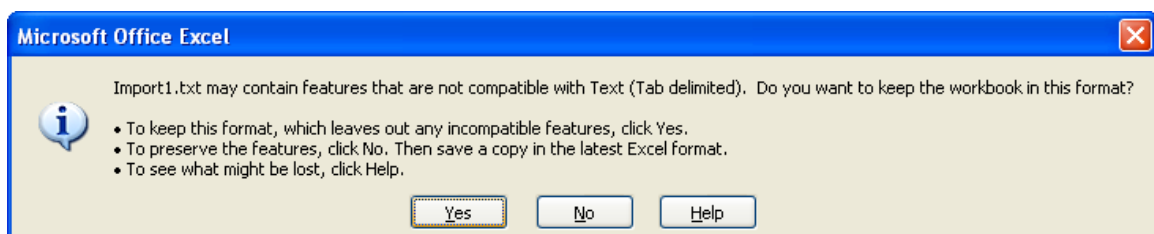
Once you have your headings and columns correct in excel you must save it in the correct file format. Click "File" then "Save As."



This will open the "Save As" window. Select where you would like to save your file. Generally we recommend saving the file to your Desktop or to the my Documents folder as it will be much easier to access at a later time. Select the drop down menu next to "Save as type" and choose "Text (Tab delimited)". Now click "Save."

Note: This step is VERY important, as your file MUST be a Text Tab Delimited file in order to upload correctly into your SendOutCards Contact Manager.

The following windows may pop up. If they do then click "Yes"



A new file is created in the area you specified. This will be the file that you will upload.

Close or hide Excel or your spreadsheet program

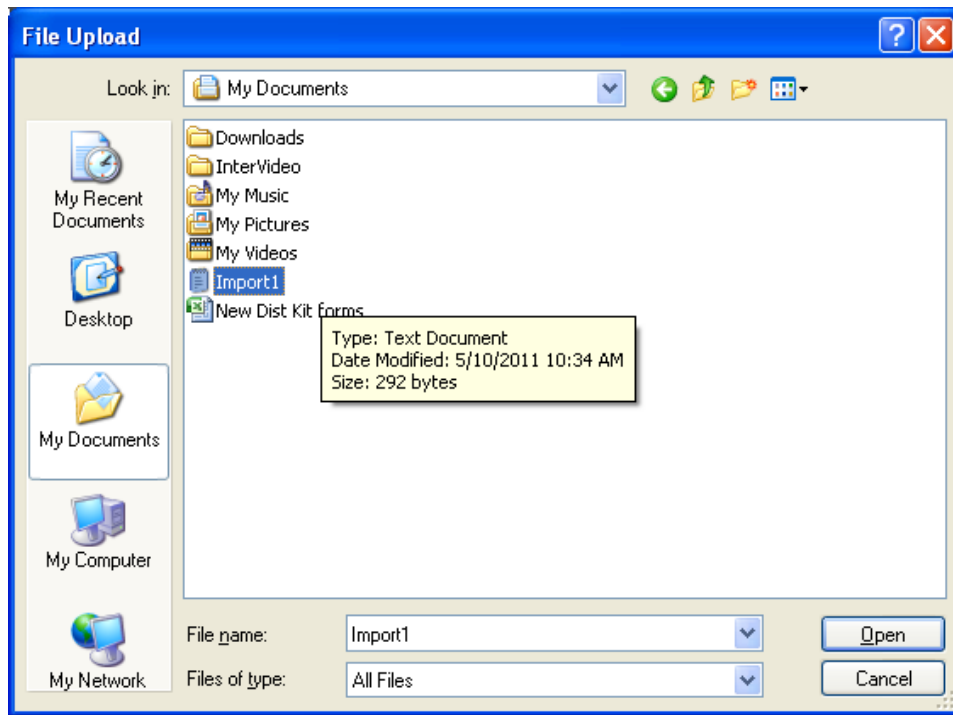
Open your web browser and login to your SendOutCards account



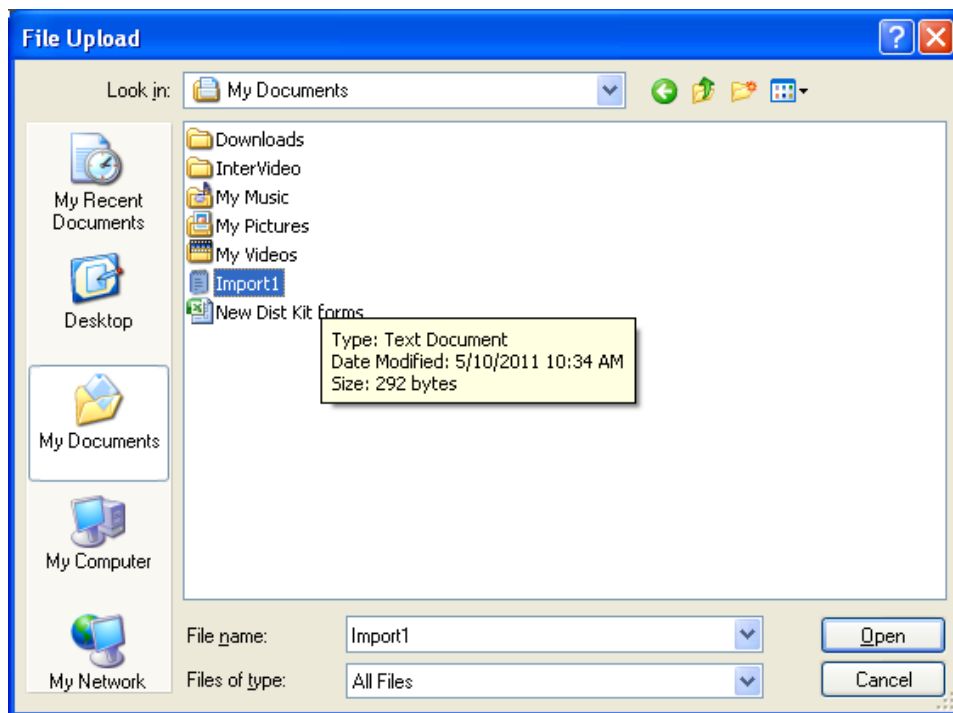
From your Card Manager Main Menu click Contacts and then Import, then from Import click "Browse."



This will open a Choose file or File upload window. Find your file, select it and click "Open." Note: The icon for the file you need to upload should look like a small notepad.



The File upload window will then close and you should now be back to your Import Contacts screen. Choose "None" for the "Profiles to Use" drop down menu then go ahead and click "Upload File."



Click the drop down menu next to "First Name" choose "first name." Note: Your first name field may not be named "first name" and may be named something else. If this is the case, make the proper selection. If needed, you may want to re-open your excel file to check on your specific file. Continue down through the drop down menus and line up all of the information that you have. If you do not have information for the field, leave that field marked as "Not in File." Type in a Profile Name (also known as the name for the "map") click "Update Profile".

Where it says "Contact Type-Group" at the bottom, this is where you would match your group name column from your spreadsheet.

Home Main Menu

Welcome, Brandon Comstock (ID: 48318)

Review and Update the Details of the File Below.

First Name Not in File

Last Name Not in File

Company Name Not in File

Address 1 Not in File

Address 2 Not in File

City Not in File

State Not in File

Country Not in File

Zip Not in File

Home Phone Not in File

Work Phone Group

Mobile first_name

Phone last_name

Fax address1

Email address2

Birth Date city

Anniversary state

Date country

Spouse Name company

Spouse Name pager

Birth Date birth_month

Contact anniversary_month

Type Group (Importing to a particular group, don't forget to match the field Contact Type (Group)) ?

Profile Name

Update Profile

McAfee SECURE
TESTED DAILY 10-MAY

Note: If you do not select a Country field from the file you uploaded, your home country will be defaulted to all of your contacts.

A preview of the first 5 contacts in your file will display. Make sure everything here is lined correctly. If it is not, correct the fields above then click "Update Profile" again.

The screenshot shows a web interface for importing contacts. At the top, there is a form with various fields and dropdown menus for mapping data from an uploaded file. Fields include Name, Address 1, Address 2, City, State, Country, Zip, Home Phone, Work Phone, Mobile Phone, Fax, Email, Birth Date, Anniversary Date, Spouse Name, Spouse Birth Date, and Contact Type (Group). A red note indicates: "(Importing to a particular group, don't forget to match the field Contact Type (Group)) ?". Below the form is a "Profile Name" field with "New Group" entered and an "Update Profile" button. A table below shows a preview of the first contact:

First Name	Last Name	Address 1	Address 2	City	State	Country	Zip	Home Phone	Work Phone	Email	Birth Date	Contact Type (Group)
Jane	Doe	1825 W		Salt Lake City	UT	United States	84119	801.463.3800		soc@soc.com	Invalid Date	New Upload

Below the table, it says: "If the table above shows the correct information, click the 'Import Entire File' button below." There is an "Import Entire File" button and a checkbox for "Import without previewing:" which is checked. In the bottom right corner, there is a McAfee SECURE logo with the text "TESTED DAILY 18-MAY".

Once everything is correct in the preview click "Import Entire File."

This will take a moment to complete then you will be directed to your Card Manager Main Menu. "All Records Imported Successfully" will appear on your screen.

If you have further questions regarding importing your contacts you may want to contact your sponsor, check the FAQ Page or contact SendOutCards Customer Support.