Importing Contacts

User Setup: All Users

Realvolve has the ability to import contacts from a standard ".csv" (Comma Separated Values) file. Almost every database and spreadsheet system has the ability to export or save to a ".csv" file which is the standard method for exchanging data. I recommend that you check the documentation of your current system to explain how to "Export" to a ".csv" file. Once you have the file saved to your computer, you can follow the steps below to upload and map the fields to successfully import your data into Realvolve.

1. Login to Realvolve.

2. At the top right corner of your screen, click on the user menu and choose **Settings**.

3. On the left side of the screen, choose **Import Contacts**.

4. Go to the section labeled **CSV Import** and click the **Choose File** button.

5. Select the **.csv** file that you exported from your previous system and click **Open**.

6. Next, click on **Upload**.

7. Once the file is uploaded check the **Choose Existing Mappings** for a predefined mapping of your previous system: #Advantage Xi(shared), #iCloud(shared) , #Insightly(shared), #IXACT Contact(shared), #Outlook(shared), #RealtyJuggler(shared), #Top Producer(shared), #Wise Agent(shared).

8. (If your .csv format is not available then begin mapping the fields as needed)

9. If you create your own mapping or make changes to an existing mapping, I recommend that you save your changes before importing so that you can re-import later if needed.

10. Click **Import** to begin the process

Use the link for step-by-step instructions: (SEE VIDEO)

Visit http://help.realvolve.com for information on specific imports like Top Producer, Advantage Xi, Wise Agent and others.

If you have any questions, please contact us at: support@realvolve.com

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