

How to Migrate from Wise Agent (Vendors)

If you currently use Wise Agent, you can migrate most of your vendor data to Realvolve quickly and easily in two steps. Export your vendor information from Wise Agent and import it into Realvolve.

Export your Vendors from Wise Agent

Here's how to export your data from Wise Agent to a CSV file suitable for use with Realvolve.

1. Login to Wise Agent.
2. At the top of your screen, click on **Contacts > Import/Export**.
3. Choose **Export Outlook/CSV**.
4. Click on the button labeled **Show Vendors**
5. Choose **Include contact notes in export (yes)**.
6. Click on the select all checkbox in the header of the export list so that all vendors are selected.
7. click on the button labeled **Continue**.
8. Select the folder path **Desktop** then enter the filename **MyVendors.csv** at the prompt and click **Save**.

Import your Vendors into Realvolve

The previous step created a data file on your desktop named MyVendors.csv. Here, load that file into Realvolve to transfer your data.

1. Login to Realvolve.
2. At the top right 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 **MyVendors.csv** file that you exported previously to your desktop and click **Open**.
6. Next, click on **Upload**.
7. Once the file is uploaded, click on **Choose Existing Mappings** dropdown and select **#Wise Agent-Vendor(Shared)** to configure the importer for your file. Scroll through the list to verify that the selected fields look correct.
8. Optionally, enter any tags you want to associate with this import. Each tag you specify is added to each record imported.
9. Scroll to the bottom of the list.
10. If you made any changes, you can name the mapping. Type a descriptive name and choose **Save and Import**. Otherwise, you just click **Import**.

The system imports your records while you continue to work. The system notifies you when done. You can check the status of the import at any time with the CSV Import Report button in the Import Contacts screen.

Questions?

Please direct questions and comments to support@realvolve.com.