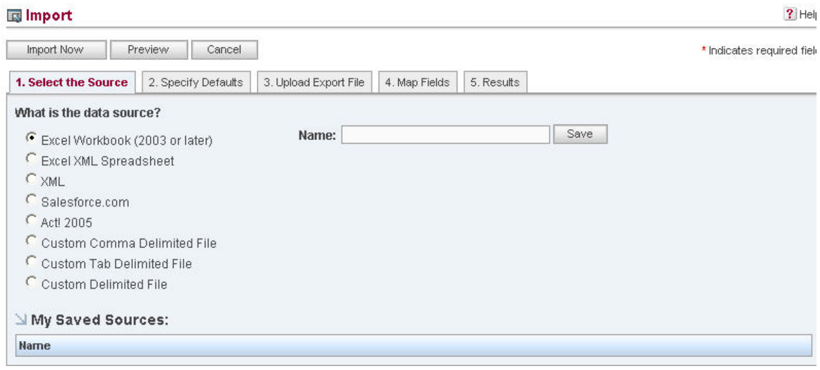
Import:

- You can import files directly into the CRM from any of the below formats:

  ✓ Excel Workbook (2003 or later)
  ✓ Excel XML
  ✓ XML
  ✓ Salesforce.com
  ✓ Act 2005
  ✓ Custom Comma Delimited File
  ✓ Custom Tab Delimited File
  ✓ Custom Delimited File



- Import is available from the below **Modules**:

  ✓ **Accounts**

  Required field: Account Name (Company name) must be filled in completely on file to import.

  ✓ **Contacts**

  Required field: Last Name on file to import must be filled in completely on file to import.

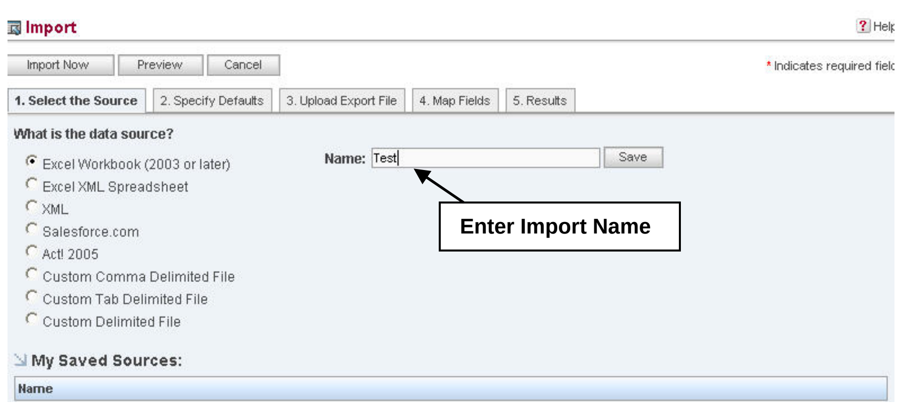
  ✓ **Opportunities**

  Required Fields: Opportunity Name and Account Name (Company Name) must be filled in completely on file to import.

To Import a file:

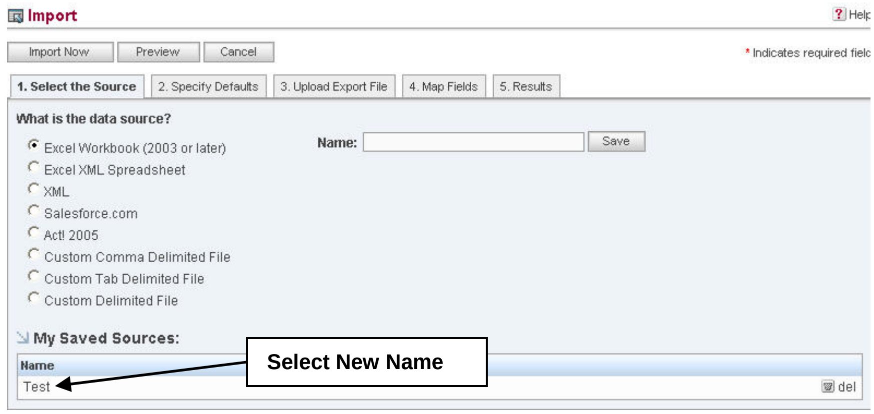
NOTE: Your file to be imported **MUST** reside on your local drive.

These directions are for importing a file to Accounts. You would follow same procedures for importing to Contacts, Opportunities and Support Tickets.

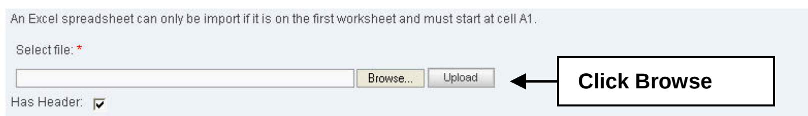


1. **Select Module** in CRM for import.
2. Click Import from **Shortcuts**.
3. **Enter a Name** in the Name field for your import. (For documentation purposes, we entered Test.)

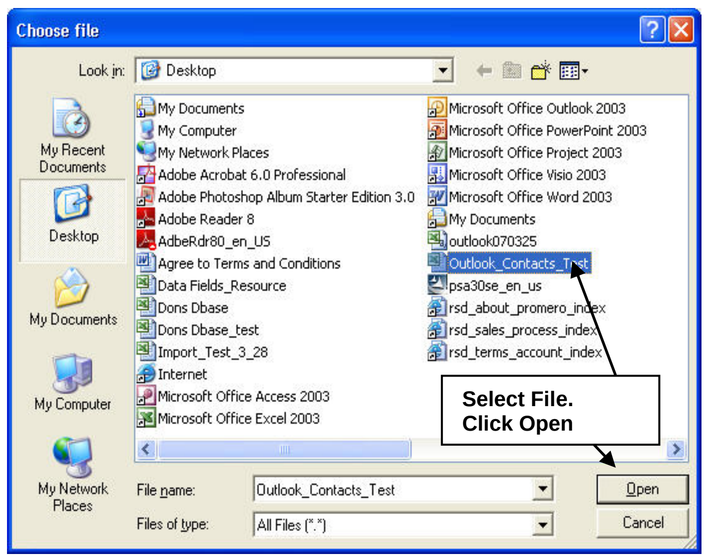
To Import a file (Continued):



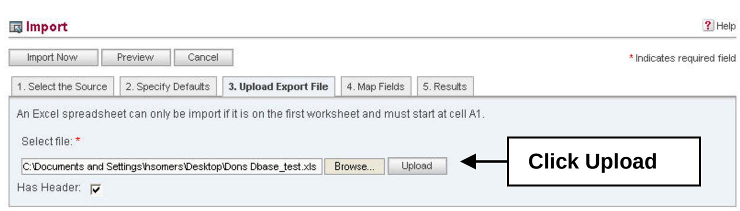
4. **Double Click Name** from My Saved Sources (this is the name you identified in above step).
5. Leave Header checked if your file contains headers.



6. **Click Browse**.



7. **Select the file** to import.
8. **Click Open** in the Chose File Window.

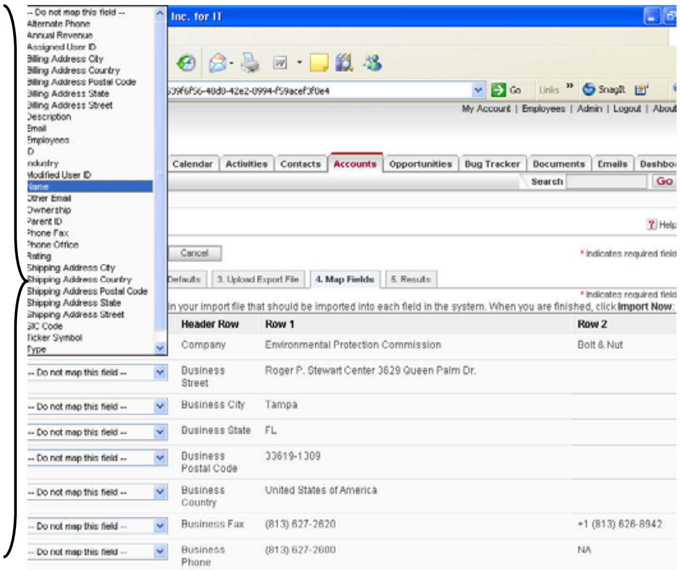


9. **Click Upload**.

To Import a file (Continued):

10. **You need to Map** the fields from your file to the fields in the CRM
11. **Click down arrow in Database Field** and select name that best matches the name in Header Row.

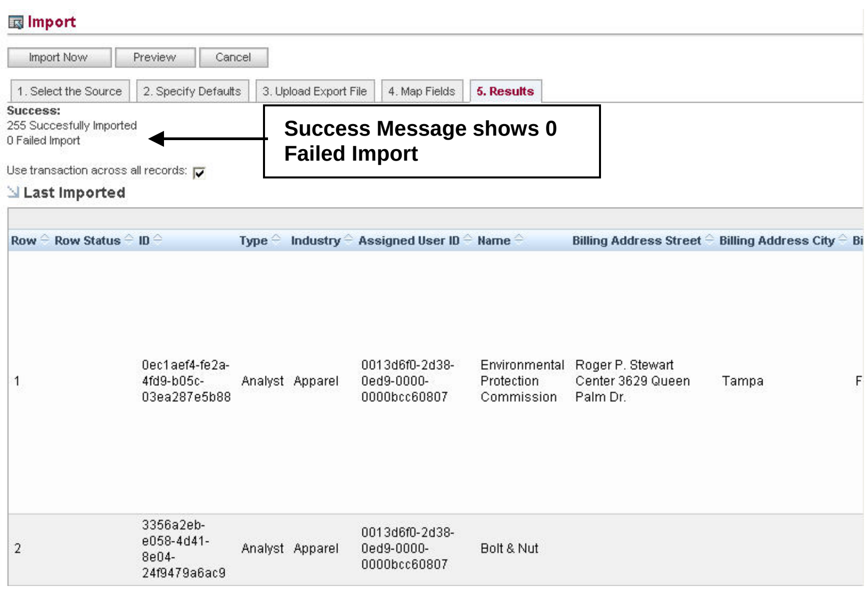
    Note: For Company, we mapped it to Name.
12. **Continue mappings** until all fields are mapped.
    NOTE: If the CRM does not have a field matching your field, select **Do not map this field.**



13. **Click Import Now**

14. A **Success screen** is displayed showing your new import when import is completed.

NOTE: If Success message shows failures, **None** of your records were imported. You must fix the problem and do another import.



Possible errors could be:

- **Account Import**: Rows containing blank **Company name** (Account) in uploaded file.
- **Contact Import**: Ross containing blank **Last Name** in uploaded file.
- **Opportunity Import**: Rows containing blank Opportunity Name and Account Name in uploaded file.

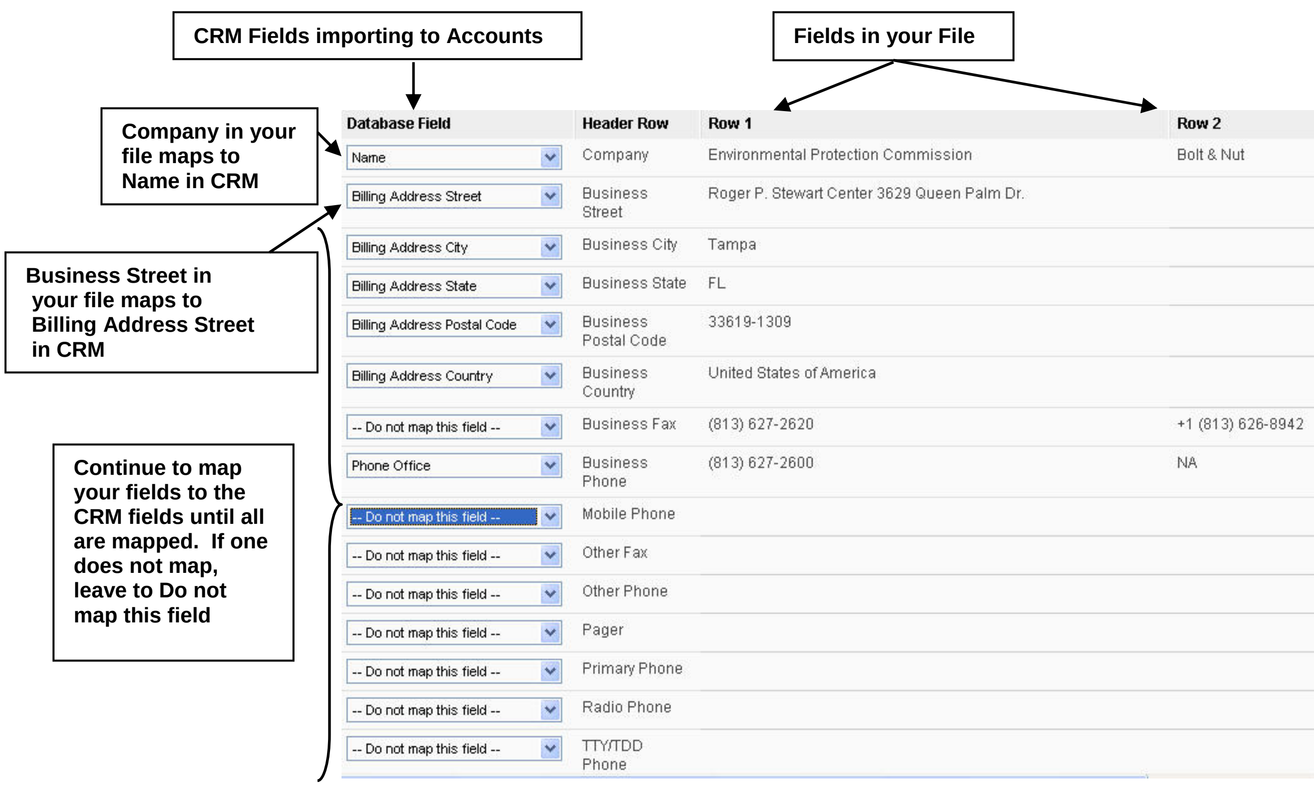
Import and Linking Modules:

- Promero will provide one (1) import per customer. But you need to follow the below rules:

1. Provide Promero support with all mapping information. The mapping information we need is as follows:

   ✓ **To import into Contacts**, there MUST be no blanks in the last name in your file.
   ✓ **To import to Accounts**, the account name or company name must be filled in completely in your file.
   ✓ **To import to Opportunities**, there MUST be no blanks in the Opportunity Name and Account Name (Company Name) in your file.

   All of the above fields are required fields in the CRM. To ensure you have all the required information contained within your file, review the Module within the CRM to ensure all required fields are identified and complete in your file. Below is an example of how the mapping should match from your file to the CRM.



Database Field	Header Row	Row 1	Row 2
Name	Company	Environmental Protection Commission	Bolt & Nut
Billing Address Street	Business Street	Roger P. Stewart Center 3629 Queen Palm Dr.	
Billing Address City	Business City	Tampa	
Billing Address State	Business State	FL	
Billing Address Postal Code	Business Postal Code	33619-1309	
Billing Address Country	Business Country	United States of America	
-- Do not map this field --	Business Fax	(813) 627-2620	+1 (813) 626-8942
Phone Office	Business Phone	(813) 627-2600	NA
-- Do not map this field --	Mobile Phone		
-- Do not map this field --	Other Fax		
-- Do not map this field --	Other Phone		
-- Do not map this field --	Pager		
-- Do not map this field --	Primary Phone		
-- Do not map this field --	Radio Phone		
-- Do not map this field --	TTY/TDD Phone		