**SCC CONNECT TRAINING**

I. Log In (www.sharperagent.com)

a. Requires Internet Explorer

II. My Profile

a. Required fields – for shipping purposes

b. When using marketing pieces, be aware of how much of personal info is included

III. Preferences

a. Suggest you change your password

IV. Contact Manager

a. Import contacts

1. Create an SCC Connect folder on your computer

2. Choose your format – Microsoft Excel

2. Export your Contacts – convert your contact list to a CSV file

\*Open your Excel spreadsheet … click on File 🡪 Save As … choose “Other Formats”

\*Under Save As type … select **CSV** (comma delimited)

\*Name your file (i.e. CHAP 2010) and choose to save it to your SCC Connect Folder

\* Click **Save**

\*Note: You may get the message that the DSV file will only save one sheet at a time. Click **OK**.

\*Return to your SCC Connect account and click **Next** to upload the file you saved

\*Group These Contacts – Click Add New Group and name this group

\*Click the browse button to select the file in your SCC Connect Folder … choose **Open**

\*Note: Be sure to check the box “This file has a header row”

\*Click **Submit**

\*Modify data field maps – define the fields from your spreadsheet

\*Click **Upload Contacts**  **-** your spreadsheet fields will appear. Check to be sure they are correct and click OK.

\*Data Import Preview – if there are any duplicates in your spreadsheet, they will appear here. Choose to abandon duplicates. Then click **Submit these decisions**. Finally … click **Finish**.

V. Manage Groups

a. This allows you to create new groups …

* Groups allow you to identify contacts in sets (i.e. convention they attended)
* Can also edit the interest groups to further delineate contacts (such as having PreK, Elementary or High School students, using particular Core levels, new Sonlighter)
* Group designations can be assigned when importing contacts
* Additional designations can be added individually, perhaps based on sales reports

VI. Look at the possibilities

1. Keep notes concerning your conversations with clients (demonstrate)
2. Create personal touches to send by e-mail (system does offer opt-out & tags contact acct)
3. Sonlight will be designing and loading a logo stationery for us to use for e-mails
4. Provides option to set appointments and receive e-mail reminder
5. Barb will provide a list of customers from Assist if requested