**SCC CONNECT – Uploading Contacts**

Log into SCC Connect and click on Contact Manager in the left menu.

To prepare to import your contacts

1. Create an SCC Connect folder on your computer

2. Preparing to import 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**.

3. Return to your SCC Connect account

\*Click on **Contact Manager**, then **Import Contacts** from buttons across the top

\*Choose **Microsoft Excel** at the bottom of the list and click **Next**

**\***You will file formatting instructions, which you have already done above, click Next

\*Group These Contacts – if you don’t already have the desired group name in your

system, click **Add New Group** and name this group

\***Important!**  Find the new group in the list and make sure it’s highlighted (click it)

\*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, if you have no

specific field to enter leave it set at default “none”

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

\*Data Import Preview – this allows you to review how your spreadsheet will fill the records. Check to be sure information is going in the right place.

\*Duplicate Review – click on Duplicate Check Options and scroll down to see options.

You can look for duplicates by first and last name, or e-mail - this is set for e-mail by

default, but you may choose by name instead, then click on **Accept**. For each duplicate

in the list you can click on the e-mail and view the full record to determine which to

keep (usually most recent info would be kept, unless it is obviously a junk e-mail and

the current record has a personal e-mail addy). Mark the radio button for each

entry to either Abandon (not input that data), Import (put data in your system), or

Replace (copy the new over the old). Then click **Submit these decisions**.

\*Finally … click **Finish**.

\*Now check your Contact Manager to ensure that the group loaded correctly: click the **Groups** button above your contacts listing, select the group you just loaded from your Groups list by clicking on the box beside the name, then click **Show All** just below the Groups button. The names from the list you just uploaded should show in the listing.