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# Importing Contacts into Fugent

# Importing Contacts into Fugent

- In Fugent, go to Contacts in the top menu
- Click on Import Contact List, from the table on the left side of the screen

The screenshot displays the Fugent web application interface. At the top, a dark header bar contains the Fugent logo on the left and a navigation menu on the right with links for DASHBOARD, MEETINGS, CONTACTS (highlighted with a white circle), WEBSITES, FILES, REPORTS, and ADMIN. Customer support information (855.227.6212) is also present in the top right. Below the header, a left sidebar lists various contact management options: CONTACTS, My Contacts, My Groups, Salesforce Import, Export Contacts, and Import Contact List (circled in red). The main content area, titled 'My Contacts', includes a search bar, a 'SEARCH' button, and filters for 'Narrow by' (set to 'Show All') and 'Sort by' (set to 'Recently Added'). A list of contacts is shown below, with the first entry for 'Suzanna Greer' (harriss7@nationwide.com) and the second entry for 'Pam Stout' partially visible. Each contact entry has an 'OPTIONS' dropdown menu.

Customer Support: 855.227.6212

FUGENT

DASHBOARD MEETINGS **CONTACTS** WEBSITES FILES REPORTS ADMIN

CONTACTS

My Contacts

My Groups

Salesforce Import

Export Contacts

Import Contact List

My Contacts

OPTIONS | ▾

ADD A CONTACT

SEARCH CONTACTS

Enter Contact Name or Email

SEARCH

Narrow by Show All ▾

Sort by Recently Added ▾

Suzanna Greer  
harriss7@nationwide.com

Pam Stout

OPTIONS | ▾

# Importing Contacts into Fugent

- Click Choose File button and select the spreadsheet you wish to import
- Click Next to continue

The screenshot displays the Fugent web application interface. At the top, a dark header bar contains the Fugent logo on the left, a navigation menu with links for DASHBOARD, MEETINGS, CONTACTS (which is underlined), WEBSITES, FILES, REPORTS, and ADMIN in the center, and customer support information (855.227.6212) with a WhatsApp icon on the right.

Below the header, a left sidebar lists various contact management options: CONTACTS (with a person icon), My Contacts (with a list icon), My Groups (with a group icon), Salesforce Import (with a cloud and download icon), Export Contacts (with a cloud and upload icon), and Import Contact List (with a document and upload icon). The 'Import Contact List' option is currently selected.

The main content area is titled 'Import Contact List' and includes the instruction: 'Import contacts by providing an XLS/XLSX/CSV file.' Below this instruction, there are two buttons: 'Choose your file' and 'Choose File'. The 'Choose File' button is circled in red. At the bottom of the page, a large yellow button labeled 'NEXT' is also circled in red.

# Importing Contacts into Fugent

- Does your spreadsheet have column headers?
- If yes, they will be listed under Your Spreadsheet Column on the left

CONTACTS

My Contacts

My Groups

Salesforce Import

Export Contacts

Import Contact List

Matching Fields

[I Need Help!](#)

We have received your spreadsheet. Now, we need to map the columns in your spreadsheet to values in our system.

COLUMN HEADERS PRESENT

YESNO

| Your Spreadsheet Column | Sample Data Value    | Fugent Value          |
|-------------------------|----------------------|-----------------------|
| NAME PREFIX             | Mr                   | <div></div>           |
| EMAIL                   | parrothead@yahoo.com | <div>Email</div>      |
| FIRST NAME              | Jimmy                | <div>First Name</div> |

# Importing Contacts into Fugent

- If Column Headers are not present, select No
- The data from the first line of your spreadsheet will populate under Sample Data Value

**CONTACTS**

- My Contacts
- My Groups
- Salesforce Import
- Export Contacts
- Import Contact List**

## Matching Fields [I Need Help!](#)

We have received your spreadsheet. Now, we need to map the columns in your spreadsheet to values in our system.

**COLUMN HEADERS PRESENT**

**YES** **NO**

| <b>Sample Data Value</b> | Fugent Value                            |
|--------------------------|---|
| Mr                       | <input type="text" value=""/>           |
| parrothead@yahoo.com     | <input type="text" value="Email"/>      |
| Jimmy                    | <input type="text" value="First Name"/> |

# Importing Contacts into Fugent

- From the drop down box next to the Sample Data Value, select the Fugent Value that corresponds with your data
- If no Fugent Value exists, select Custom and enter a Field Value
- Once all Fugent Value's have been selected, hit Next

The screenshot displays the 'Import Contact List' section of the Fugent interface. On the left, a sidebar contains three options: 'Salesforce Import', 'Export Contacts', and 'Import Contact List' (which is highlighted). The main area is titled 'COLUMN HEADERS PRESENT' and features two large buttons: 'YES' and 'NO'. Below these, a table is shown with two columns: 'Sample Data Value' and 'Fugent Value'. The 'Sample Data Value' column contains the text 'Mr', 'parrothead@yahoo.com', 'Jimmy', and 'Buffett'. The 'Fugent Value' column has a dropdown menu open, showing a list of options: 'Name Prefix' (highlighted in blue), 'First Name', 'Middle Name', 'Last Name', and 'Job Title'. Red circles are drawn around the 'Fugent Value' header and the 'Name Prefix' option in the dropdown.

| Sample Data Value    | Fugent Value |
|----------------------|--------------|
| Mr                   | <div>▼</div> |
| parrothead@yahoo.com | Name Prefix  |
| Jimmy                | First Name   |
| Buffett              | Middle Name  |

# Importing Contacts into Fugent

- You may have rights to be able to upload contacts for another user. If so, hit Yes to choose from a list of users that you are able to upload the list to their contacts
- You can also choose to remove certain contacts from the list that you do not wish to upload

**CONTACTS**

- My Contacts
- My Groups
- Salesforce Import
- Export Contacts
- Import Contact List

## Review Contacts

Your spreadsheet has been processed. Please take a moment to verify the below contacts.

WOULD YOU LIKE TO UPLOAD ON BEHALF OF ANOTHER USER?

YES NO

WOULD YOU LIKE TO ADD THESE CONTACTS TO A GROUP?

YES NO

*IMPORTED CONTACT RECORDS WILL OVERRIDE EXISTING FUGENT CONTACTS WITH MATCHING EMAIL ADDRESSES.*

Jimmy Buffett  
parrothead@yahoo.com

**REMOVE**

# Importing Contacts into Fugent

- If you would like to add your contacts in as a group, select Yes
- You may then either select from one of your existing groups to add the contacts to or create a new group by clicking Create Group and naming it

The screenshot shows the 'REVIEW CONTACTS' step of the Fugent contact import process. On the left is a sidebar with navigation links: 'My Contacts', 'My Groups', 'Salesforce Import', 'Export Contacts', and 'Import Contact List'. The main content area displays a confirmation message: 'Your spreadsheet has been processed. Please take a moment to verify the below contacts.' Below this, there are two questions with corresponding buttons. The first question is 'WOULD YOU LIKE TO UPLOAD ON BEHALF OF ANOTHER USER?' with 'YES' and 'NO' buttons. The second question is 'WOULD YOU LIKE TO ADD THESE CONTACTS TO A GROUP?' with 'YES' and 'NO' buttons. The 'YES' button for the second question is circled in red. Below the buttons, there is a dropdown menu labeled 'Select a Group' (also circled in red) and a yellow 'CREATE GROUP' button (circled in red). At the bottom, a warning states: 'IMPORTED CONTACT RECORDS WILL OVERRIDE EXISTING FUGENT CONTACTS WITH MATCHING EMAIL ADDRESSES.' The user profile at the bottom shows 'Jimmy Buffett' with email 'parrothead@yahoo.com' and a 'REMOVE' button.

REVIEW CONTACTS

Your spreadsheet has been processed. Please take a moment to verify the below contacts.

WOULD YOU LIKE TO UPLOAD ON BEHALF OF ANOTHER USER?

YES NO

WOULD YOU LIKE TO ADD THESE CONTACTS TO A GROUP?

YES NO

Select a Group CREATE GROUP

IMPORTED CONTACT RECORDS WILL OVERRIDE EXISTING FUGENT CONTACTS WITH MATCHING EMAIL ADDRESSES.

Jimmy Buffett  
parrothead@yahoo.com REMOVE



# Importing Contacts into Fugent

- The final step is to hit Next at the bottom of the page and your contacts will be imported into your account.
- NOTE: When importing contacts, if a contact already exists with the same email address as the contact you are importing that contact will be updated to the new information being imported (i.e. if you have John Smith with an email address with [sales@abcinsurance.com](mailto:sales@abcinsurance.com) and you import a contact with the name of Sally Jones with an email of [sales@abcinsurance.com](mailto:sales@abcinsurance.com) you will no longer have John Smith as a contact in Fugent as his information will be overwritten because of identical email addresses).