

This guide is for Consultants working only in PamperedPartner® (no eBizTools™/PWS).

Follow the steps below to successfully move your existing contacts to the new website.

1. Export contacts from PamperedPartner®.

- a. Navigate to *Export Contact Management* and set export (Figure 1).
 - From the Utilities menu in PamperedPartner, select **Export Contact Management**. The *Export Contact Management* screen displays.
 - Change the date for **last Contact Management export** to your Agreement Date so that your full contact list will be included.
 - Click **Continue**. The *Save As* screen displays.
- b. Save Contact export file (Figure 2).
 - If desired, change the file name to something more specific (e.g. ContactsforNewWeb-date).
 - Make note of the folder where the file is being saved for the next steps (circled in Figure 2).
 - Click **Save**. A message will display with either the number of contacts exported or no records to export.

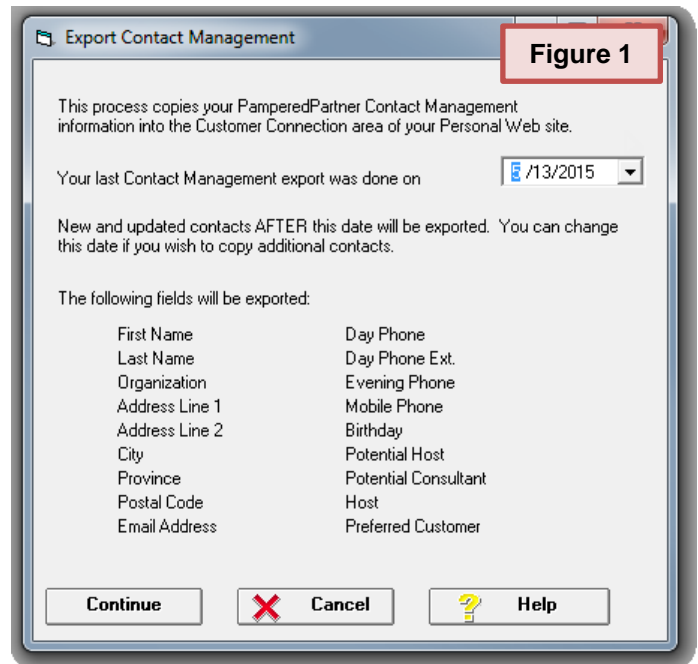


Figure 1

2. Clean up any duplicate contacts.

In particular, you don't want two different contacts to have the same email address.

NOTE: When you upload your contacts to the new website, the system will accept the first contact record with a particular email, and any other records with that same email will be disregarded. So it is critical that you remove duplicates before uploading.

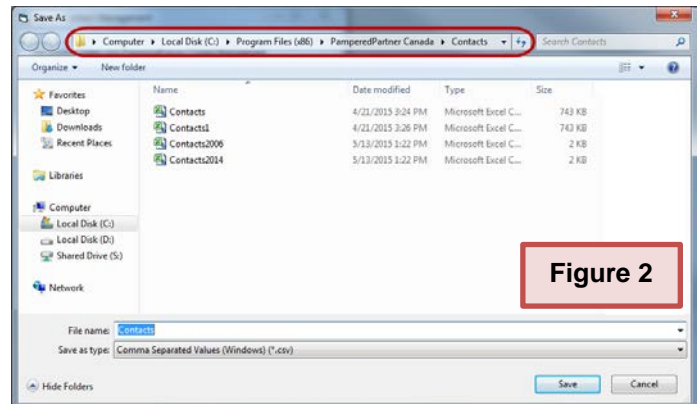


Figure 2

- a. Open the CSV file using a spreadsheet program (i.e. Excel or Numbers).
- b. Sort the records by email.
- c. **If you have more than one contact record with the same email address**, you need to either:
 - Remove any rows containing the duplicate email -OR-
 - Delete just the email address from all but one of the contact records.

TIP: Review and clean up any other contact duplications (e.g. duplicate names, phone numbers, etc.) at this time as well, so that you send accurate records to the new website.

NOTE: A contact record without an email address will be accepted if you don't have that customer's correct email.

- d. Save changes and close the file.

3. Import contacts from PamperedPartner® into the new Consultant's Corner.

- a. Login to the new site through new.pamperedchef.ca.
- b. Under Selling & Recruiting, select **My Contacts**. The *My Contacts* page opens.
- c. Click the **Import PamperedPartner Contacts** button.



The *Import Contacts* view opens (Figure 3).

- d. Click inside the **File To Upload** box, then find and select the CSV file you saved from steps 1 and 2.
- e. Click **Upload**.

A processing dialog box displays while the system is working. This process may take several minutes (Figure 4).

Once the upload is complete, a summary will display (Figure 5).

- f. Click **Close**.

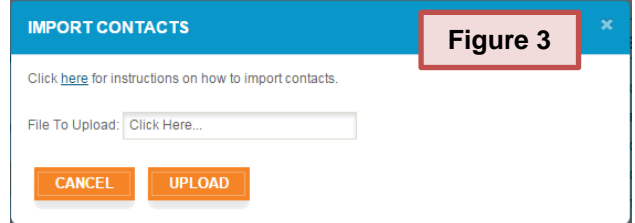


Figure 3

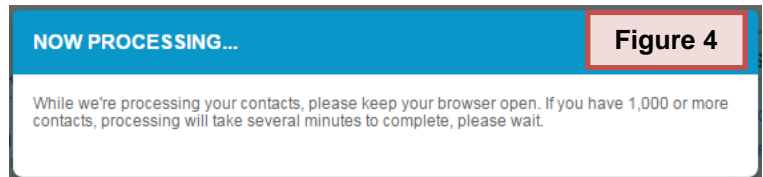


Figure 4

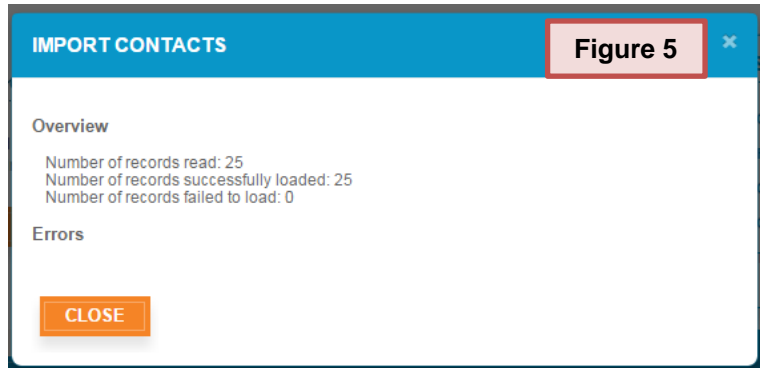


Figure 5

NOTES:

- When imported into the new website, the **Potential Host, Potential Consultant, Host, and Preferred Customer** fields from PamperedPartner will be used to place contacts in predefined groups of the same names.
- By default, imported contacts will be set as 'opted in' to receiving emails. After uploading, you should update the privacy settings on contacts whom you know do not wish to receive emails. When reviewing your contacts preferences, please remember to keep CASL requirements in mind.
- If all or most of your records fail to load, check the CSV file for any unusual characters in the fields and whether the correct details are under each column. If you cannot easily correct the CSV file for it to upload properly, or if you encounter any other issues with the upload, contact Technical Support for assistance.

Congratulations!

You're ready to start working with your contacts in the new website!

Learn more from the how-to video *All About Contacts* on
 Consultant's Corner > Training & Resources > Web Tools Training > More Consultant Tools.