

# Массовая загрузка контактов в маркетинговый список один файлом.

1. Выбираем нужный маркетинговый список. Нажимаем на него.

The screenshot shows the CRM interface for a campaign named "Магистр аналитики бизнеса". The "Сводка" (Summary) section displays campaign details: Name, Code (CMP-01021-J4F9V), Currency (Russian Ruble), and Type (Event). The "ДЕЙСТВИЯ" (Actions) section is empty. The "МАРКЕТИНГОВЫЕ СПИСКИ" (Marketing Lists) table is highlighted with a red box. The table lists several lists, with "Вебинар 'Магистр а...' (Webinar 'Mag...') selected and highlighted with a red box. A red arrow points to this selection. The table columns include Name, Number of participants, Creator, and Created On.

Название ↑	Число участн...	Кем создано	Created On
Portfolio MBA		Головко, Валерия	08.02.2021 1...
АСАВ МАБ		Головко, Валерия	20.04.2021 1...
Вебинар "Магистр а..."		Екшмебеева, Карина	21.05.2021 2...
Задать вопрос "Маг...		Головко, Валерия	08.02.2021 1...

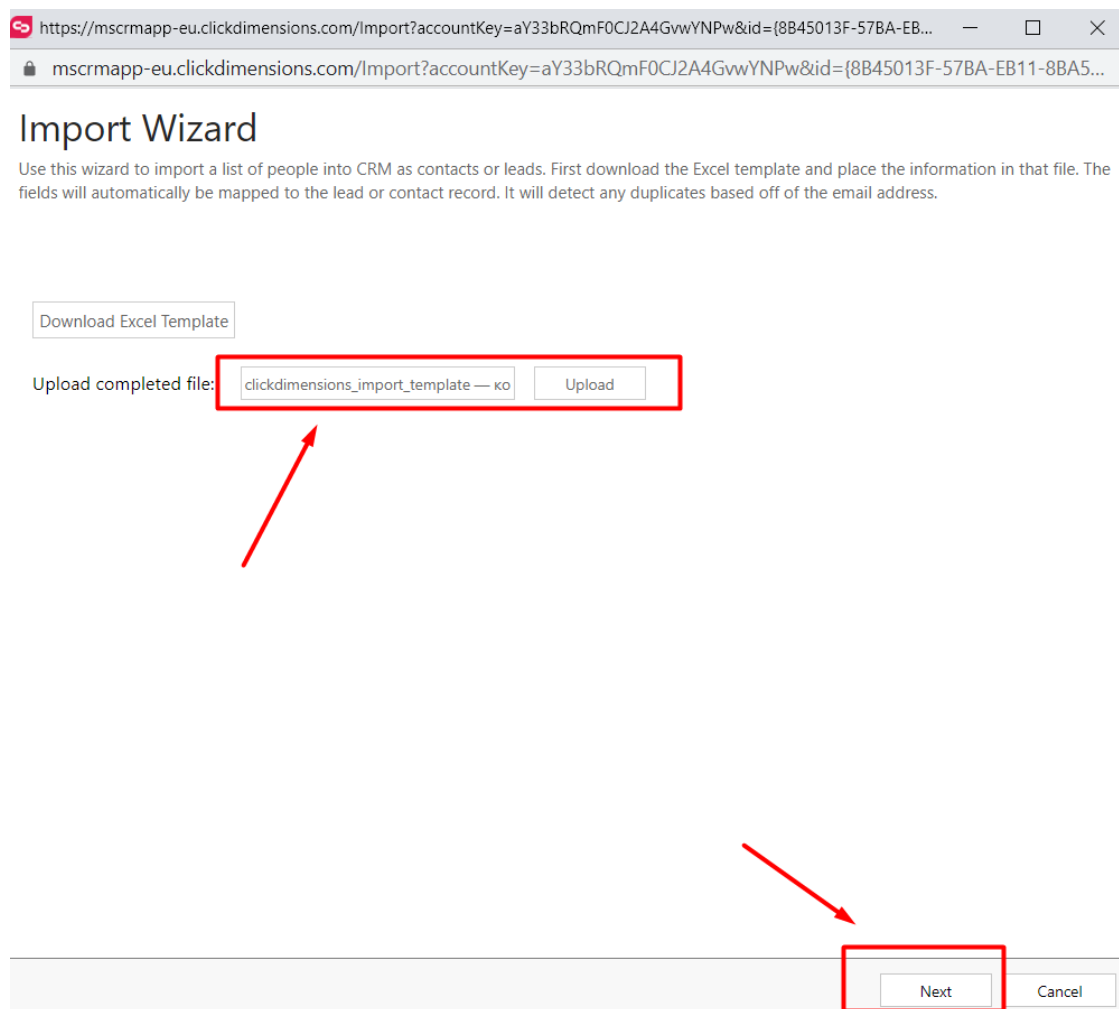
2. Откроется страница выбранного маркетингового списка. Сверху справа нажимаем на «CLICKDIMENSIONS IMPORT».

The screenshot shows the CRM interface for the selected marketing list "Вебинар 'Магистр аналитики бизнеса'". The "Сводка" (Summary) section displays list details: Name, Type (Static), Category, and Target (Contact). The "Участники" (Participants) section shows a list of participants with redacted names. The "Кампании" (Campaigns) section shows the associated campaign. The "CLICKDIMENSIONS IMPORT" button is highlighted with a red box, and a red arrow points to it. The button is located in the top right corner of the interface.

Название ↑	Тип кампании...	Причина сост...
Магистр аналитики бизнеса	Мероприятие	Предложено

3. Загружаем файл «clickdimensions\_import\_template», в который внесены данные контактов.

4. Далее нажимаем на «Next».



5. Выбираем «Only fill in blank fields».  
Выбираем «Contacts».
6. В поле «Backup owner:» через поиск ищем свою фамилию и выбираем.
7. Далее нажимаем на «Next».

https://mscrmapp-eu.clickdimensions.com/Import?accountKey=aY33bRQmF0CJ2A4GvwYNPw&id=%7b8B45013F-57BA...

mscrmapp-eu.clickdimensions.com/Import?accountKey=aY33bRQmF0CJ2A4GvwYNPw&id=%7b8B45013F-57BA-EB11-8...

## Import Wizard

Use this wizard to import a list of people into CRM as contacts or leads. First download the Excel template and place the information in that file. The fields will automatically be mapped to the lead or contact record. It will detect any duplicates based off of the email address.

### Mapping

The system will check for any existing contacts or leads with the same email address. If one exists the information from the file can overwrite the fields in CRM, only fill in the blank fields on the record, or not map anything.

When there is an existing record with the same email address:

- Overwrite fields in CRM
- Only fill in blank fields
- Do not map anything

When the email address does not already exist in CRM create all new records as:

- Leads
- Contacts

**Backup Owner** - Applied on new contacts/leads only

There is an owner column in the Excel template which should match to a user record. If there is no owner set, or the owner specified does not exist it will make the owner of the contact or lead the user you select here.

Backup owner: \* Турдуева, Альбина

Previous Next Cancel

8. Проверяем, чтобы галочка стояла напротив «Add all to Marketing List:».
9. В поле « Contact marketing list:» должен отображаться выбранный ранее маркетинговый список.
10. Далее нажимаем на «Next».

https://mscrmapp-eu.clickdimensions.com/Import?accountKey=aY33bRQmF0CJ2A4GvwYNPw&id=%7b8B45013F-57BA... — □ ×

mscrmapp-eu.clickdimensions.com/Import?accountKey=aY33bRQmF0CJ2A4GvwYNPw&id=%7b8B45013F-57BA-EB11-8...

## Import Wizard

Use this wizard to import a list of people into CRM as contacts or leads. First download the Excel template and place the information in that file. The fields will automatically be mapped to the lead or contact record. It will detect any duplicates based off of the email address.

### Actions

- Create Event Participation Records
- Add all to Marketing List:
- Remove all from Marketing List

If you use both leads and contacts you may want to choose both a lead and contact marketing list. All existing and newly created leads or contacts will be added to these lists.

Lead marketing list:

Contact marketing list:

Previous  Cancel

11. Указываем электронный адрес, на который должно прийти уведомление о завершении переноса контактов.

12. Далее нажимаем на «Finish» и после на «Close».

https://mscrmapp-eu.clickdimensions.com/Import?accountKey=aY33bRQmF0CJ2A4GvwYNPw&id=%7b8B45013F-57BA...

mscrmapp-eu.clickdimensions.com/Import?accountKey=aY33bRQmF0CJ2A4GvwYNPw&id=%7b8B45013F-57BA-EB11-8...

## Import Wizard

Use this wizard to import a list of people into CRM as contacts or leads. First download the Excel template and place the information in that file. The fields will automatically be mapped to the lead or contact record. It will detect any duplicates based off of the email address.

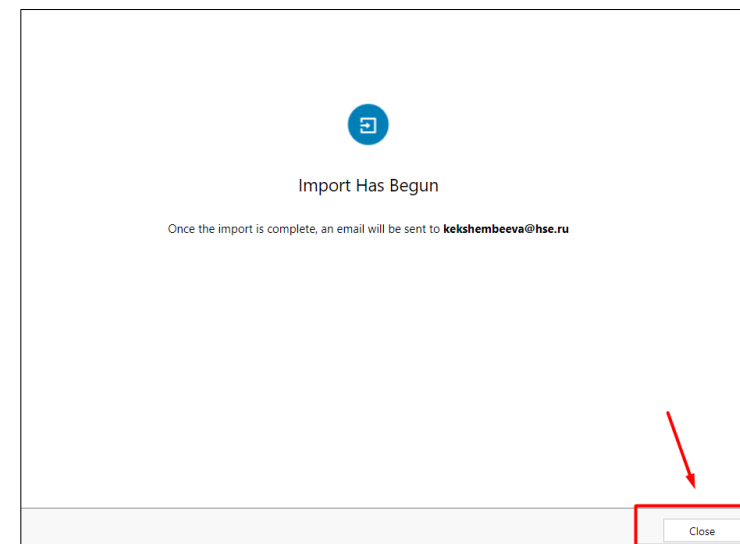
### Review your settings

File selected: clickdimensions\_import\_template — копия.xlsx  
Mapping settings: Only fill in blank fields  
New records: Contacts  
Actions: Add all to static Marketing List: Вебинар "Магистр аналитики бизнеса"

Please provide an email address to receive a notification when the import is complete.

Notification email address: \*

Previous Finish Cancel



13. На указанную почту придет уведомление о завершении переноса контактов. После чего контакты можно будет увидеть в маркетинговом списке.