

**The Mobile Office System That Works**

***The***

**Google™**

***Universe***

**KW Boot Camp Prep Guide**



**This guide will help you set up basic features BEFORE you attend the Boot Camp. If you are uncomfortable doing so, just having a Gmail account established will be fine.**

**Note: A laptop computer is **HIGHLY RECOMMENDED** to complete the steps performed in the class. Bring your tablet and smartphone as well, but our work will be done on the computer. If you must borrow a computer, none of your data will be saved on that device. An iPad will do, but may have some limits in class.**

Your **kw.com** email address establishes a fully functional Google account. It is recommended that you also have a personal Google account in addition to the kw.com email account.

Skip this step if you already have a second Google account created

Create a Google account <https://accounts.google.com/NewAccount>

Write down your Google username:

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Write down a hint for your password:

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Write down the backup email address you listed in case you need to reset your credentials:

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**Make sure you have access (passwords) to all of your email accounts when you come to the class.**

## One Account- All of Google

Your Google username and password will be used for all the Google products below:

- Open a Gmail account <http://mail.google.com/>
- Open Google+ [www.google.com/+](http://www.google.com/+)
- A Google Calendar <https://www.google.com/calendar>
- A Google Drive [drive.google.com/](http://drive.google.com/)
- A Google Photos Account [photos.google.com/](http://photos.google.com/)
- A YouTube Account [www.youtube.com/user/Google](http://www.youtube.com/user/Google)
- In addition, you should get a free 2GB DropBox account (not required) [www.dropbox.com/](http://www.dropbox.com/)
- Also, a free Evernote account <https://evernote.com/>

## Prepare Your Contacts for Export/Import

**Note: If your contact database is on your computer, please make sure you can make them easily accessible. Know your password if necessary.**

**We will be following the steps below to get your contacts into Gmail. No action is required by you at this time.**

Your CRM or **Client Relationship Management System** is essential to the success of your business and the best use of these Google apps. That is why we begin with this important first step.

## Exporting your CRM to Google Contacts

Regardless of the PIM you currently use, the process of exporting your contacts and importing the data into Google Contacts is relatively easy, if you follow the steps, you'll have your contacts copied over in no time.

### How to Export your eEdge® CRM to Google Contacts

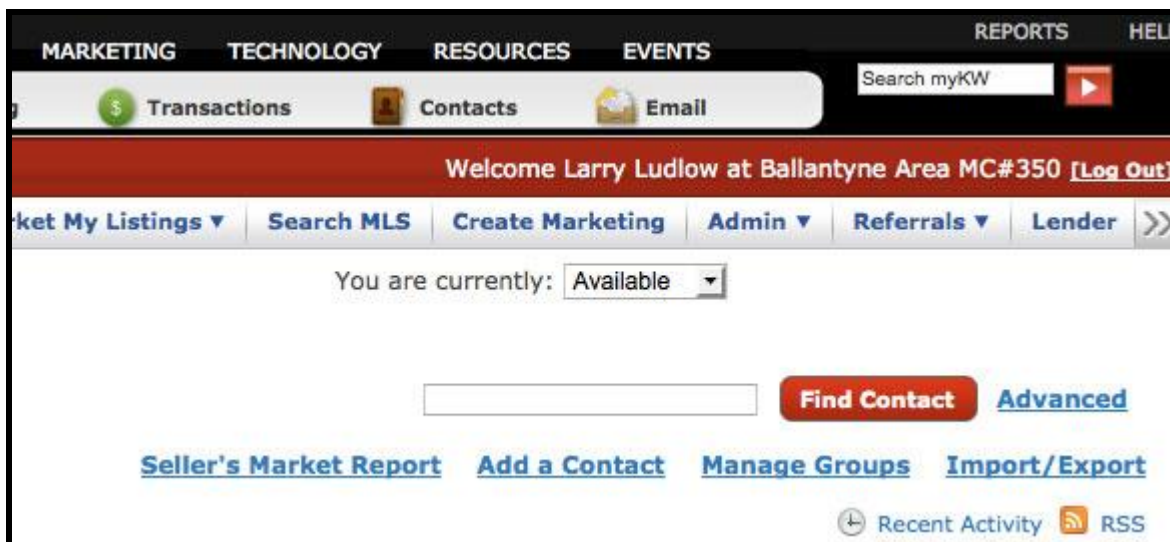
Login to your eEdge account.

Click on View Contacts under myContacts in the myControl Panel\section.

Next, select "Import/Export" on the far right just above your contact



Now, select "Import/Export" on the far right just above your contact list.



Select the Export Contacts tab. Select the agent you would like to export contacts for, select the contact groups you'd like to export and the contact status.

Save the file on your desktop as a CSV file, ready for import into Gmail Contacts.

### **Exporting your CRM to Google Contacts**

Regardless of the PIM you currently use, the process of exporting your contacts and importing the data into Google Contacts is relatively easy, if you follow the steps, you'll have your contacts copied over in no time.

#### **Step One: Prepare your CRM data**

Since this information is the life blood of your business, it is important that we have each contact profile as complete and organized as possible. Take the time to go through each item, fill in as many empty spaces as possible. Make sure you have at least the five essentials- full name, mailing address, email address, office & mobile phone and birth date stored under notes.

#### **Productivity Tip: The Three Steps To Building Your CRM**

##### **Step One: Start with what you already have**

- *Go through each of your contacts, looking for empty spaces*
- *Fill those gaps as much as possible, with a focus on future marketing*

##### **Step Two: Customize, categorize and downsize**

- *Create custom categories, and identify who goes where*
- *Place contacts in multiple categories if possible*
- *Delete or archive contact information you no longer need or use*

##### **Step Three: Back up your data and share it on the cloud**

- *Export your entire database and save it on an external disk*
- *Export and copy your data into Gmail or another online PIM system*
- *Store a copy in an online file storage server- it can easily be shared from here*
- *Set a weekly date for backing up and renewing stored data*

(yes, birth date!) If you can, add anniversary dates, and other demographic information that be can be used for staying connected.

## Step Two: Assign all profiles into at least one category

Assigning a profile into one or more categories will be useful to your marketing efforts moving forward, as well as allowing the Google apps to target specific markets for you. Missing this step will cause you lots of work in the future.

## Step Three: Export your CRM data into a file

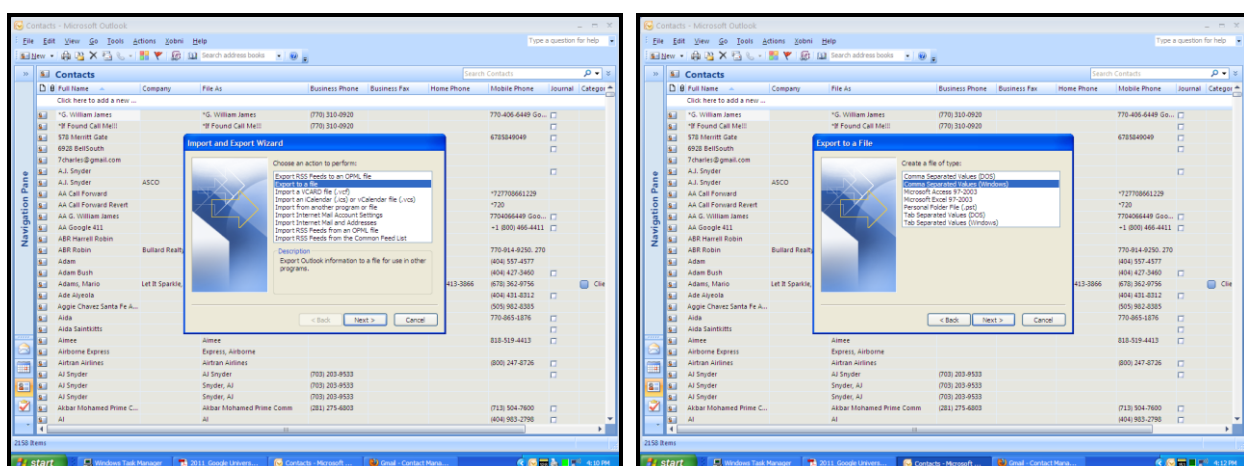
The easiest way to get your data into Google Contacts and have it organized from the outset is to export the contacts one category at a time. Sort your contacts by category, then

Highlight the group you intend to export. The example below is how to export from Microsoft Outlook 2007:

Select File > Import and Export

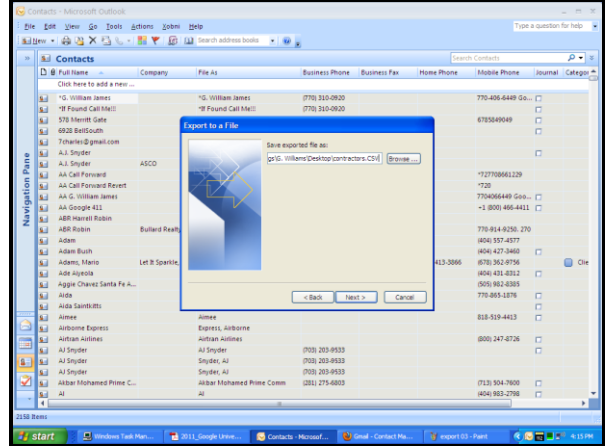
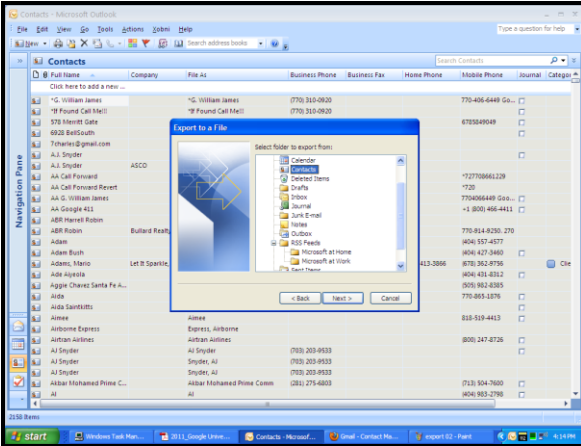
Select Export To A File

Select Comma Separated Values (Windows)

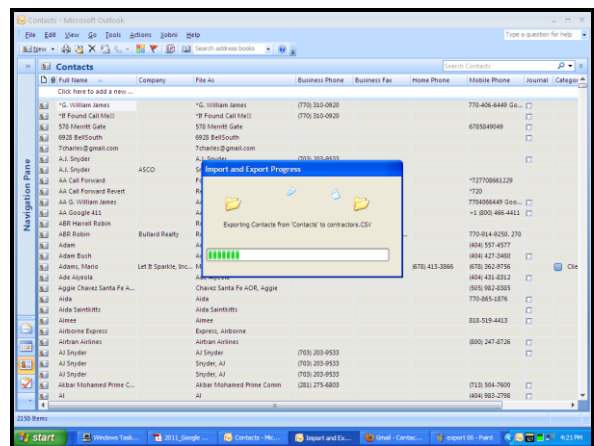
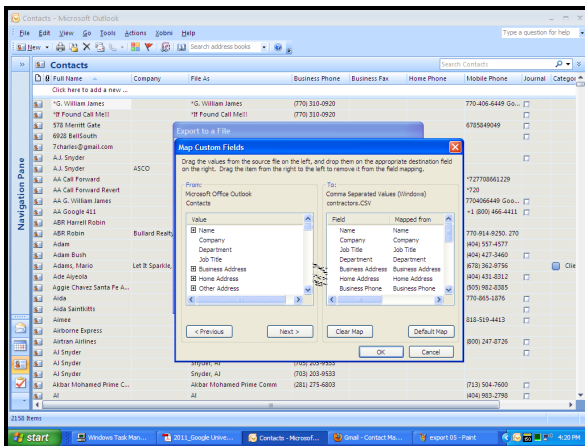


Select the location of the data to import, in this case Contacts

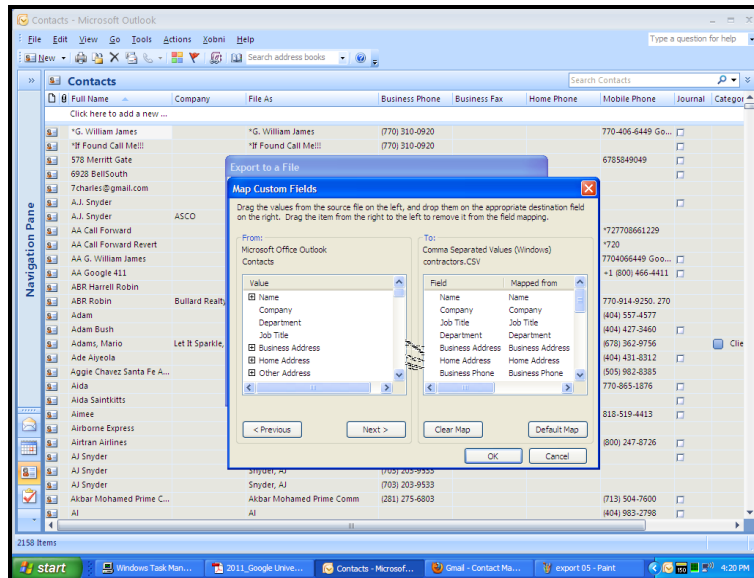
Save to a location on the computer, and name the file the same as the category you are importing.



**VERY IMPORTANT:** Mapping the custom fields will assure that the data you export will be the complete contact profile when you import it into Google contacts.



In Outlook, simply drag from the left box what you want to include in the export box on the right. Other systems will have similar options for you to customize which data fields you are exporting.



Now, you are ready to **import** the data into Gmail contacts.

### Step Four: Import your CRM data into Google Contacts

Following the steps described above, **import your contacts into Google one category at a time**, so they will be organized at the outset. This will have your contacts better organized, and the Google apps will be able to better target your communication.

## Export your CRM to Google Contacts from other contact databases

Regardless of the PIM you currently use, the process of exporting your contacts and importing the data into Google Contacts is relatively easy, if you follow the steps, you'll have your contacts copied over in no time. In this case we will use Microsoft Outlook. **CTRL + Click** these links to learn to export from other databases:

[Export Act! to a CSV](#)   [Export Top Producer to a CSV](#)   [Export Blackberry to a CSV](#)

[Export Yahoo! to a CSV](#)   [Export Mac Contacts to a CSV](#)   [Export from Outlook 2010](#)

[Export Hotmail to a CSV](#)   [Export from Outlook 2007](#)   [Export Verizon backup Assistant](#)

**A Tip:** It may be easier to create a CSV file for your entire contact list, then clean it up in Microsoft Excel as a spreadsheet. **Sort by any column, see which fields need to be filled as a whole list. Add a column for Categories, sort by that field and make separate CSV files for each category. Your data is now ready for import. Make sure that the top row of the columns describe the field they will be assigned (ie "Name").**



## Import your CRM data from Mac Computers

Click which group of contacts or the individual contact you want to export from your Address Book on your Mac (e.g. "All Contacts" or "John Doe"). From the File menu select Export. Click "Export Group vCard" or "Export vCard" depending on whether you are exporting a group of contacts or just a single contact. Save vCard file to a known location.

From Gmail click "Contacts". Click the "Import" link on the right side of the screen. Click "Browse" and find the location of the vCard file you saved above. Click the "Import" button.

Note: Macs do not use CSV files, and you don't need to use conversion software, as mentioned in other posts. [Import/Export on a Mac using vCard files.](#)

If you need assistance in setting up any of these accounts prior to class, email your question to [william@pdapowerplus.com](mailto:william@pdapowerplus.com)

Please include the date of your class.