

Exporting Subcontractors, Buyers, and Prospects to Excel and/or importing them into Outlook

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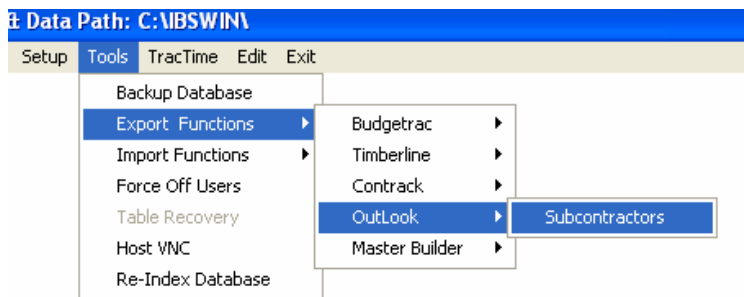
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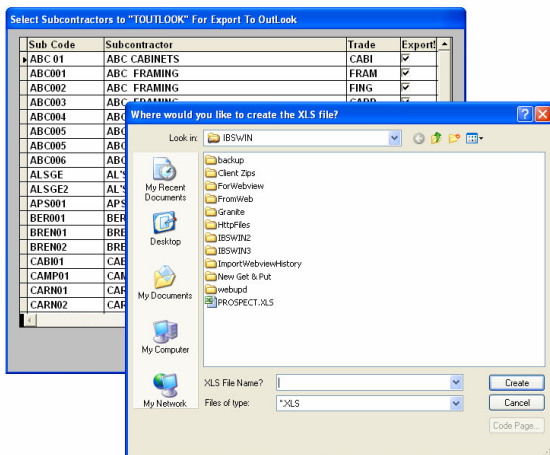
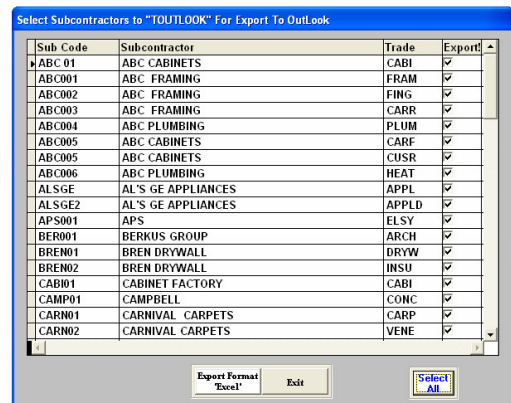
EXPORTING TO EXCEL

Exporting Subcontractors



To export your subcontractors from IBSWIN go to the Tools: Export Functions: Outlook

Select the Subcontractors you want to export or use the Select All button to check them all.

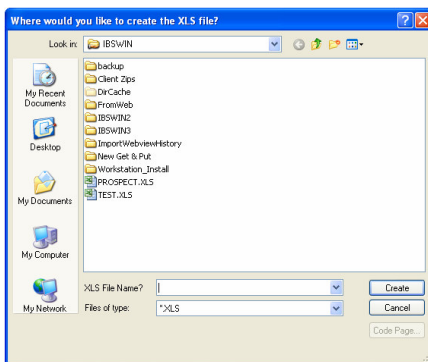


You will then be prompted to enter a file name and to save the Excel file to your computer using the Create button. Make sure the file name is one word only with no weird characters and save it into the IBSWIN folder. Now the file you created will be ready for you to open using Excel.

Exporting Prospects or Buyers

Either of these can be exported from any of the Buyer or Prospect Listing Reports. The Buyer Listing can be found throughout IBSWIN. Locations include: **Reports: Sales Reports: Buyer Listing; Reports: Customer Service Reports: Buyer Listing; Sales: Buyers: Buyer Listing;** and also **Service: Buyer Listing**. The prospect listing can only be found in **Sales: Prospects: Prospect Listing**. Each of these menus will allow you to select your Buyers or Prospects by Project or Phase.

To export to Excel you must select Buyer (or Prospect) Email List after choosing the project of phase you wish to export. You then have various other filters to select from. You will be able to select the Excel check box at the bottom to do the export. (To capture everyone remove the From date before exporting)



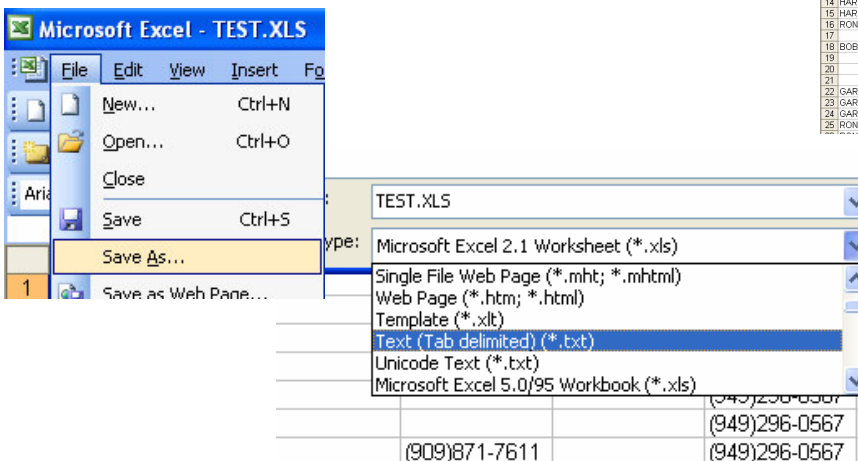
After clicking OK you will then be prompted to enter a file name and to save the Excel file to your computer using the Create button. Make sure the file name is one word only with no weird characters and save it into the IBSWIN folder. Now the file you created will be ready for you to open using Excel.

IMPORTING TO OUTLOOK

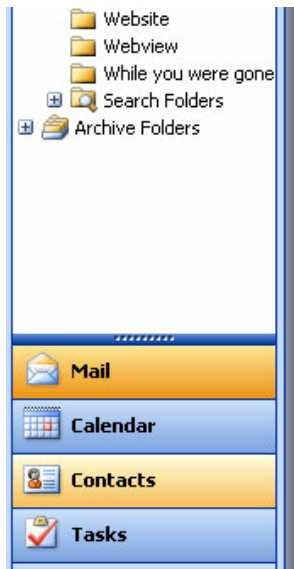
Converting Excel file to Tab Delimited

Open the Excel file in Excel. Then go to **File: Save As** and save the file as a **Text (Tab Delimited)** file as pictured below.

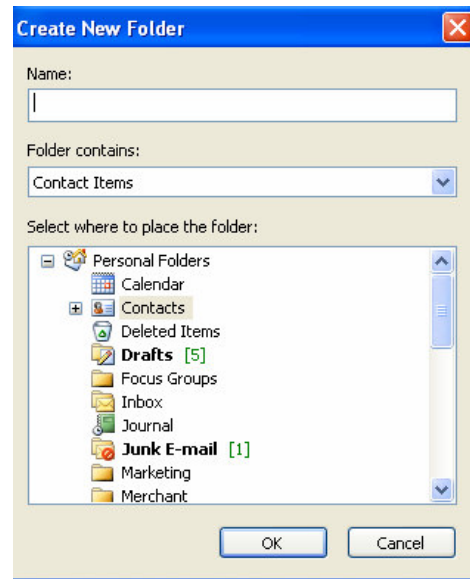
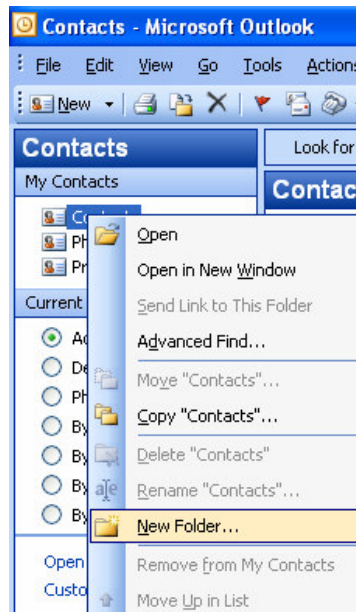
Contact	Full name	phone	homeph	fax	cell
2	GEORGE BREN	ABC CABINETS	(818)988-1717		(949)296-0567
3	KEN ROSS	ABC FRAMING	(714)516-5151		(949)296-0567
4	KEN ROSS	ABC FRAMING	(714)516-5151		(949)296-0567
5	KEN ROSS	ABC FRAMING	(714)516-5151		(949)296-0567
6	BOB GAINS	ABC PLUMBING			(949)296-0567
7	GEORGE BREN	ABC CABINETS	(818)988-1717		(949)296-0567
8	GEORGE BREN	ABC CABINETS	(818)988-1717		(949)296-0567
9	JON SMITH	ABC PLUMBING			(949)296-0567
10	RON GREEN	ALS GE APPLIANCES	(949)817-7161		(949)296-0567
11	RON GREEN	ALS GE APPLIANCES			(949)296-0567
12		APS			(949)296-0567
13	BILL BERKUS	BERKUS GROUP	(949)261-7171		(249)203-2122
14	HARRY GREER	BREN DRYWALL	(415)717-7117		(949)296-0567
15	HARRY GREER	BREN DRYWALL	(415)717-7117		(949)296-0567
16	RON GREER	CABINET FACTORY	(714)561-5597		(949)296-0567
17		CAMPBELL			(949)296-0567
18	BOB FREED	CARNIVAL CARPETS			(949)296-0567
19		CARNIVAL CARPETS			(949)296-0567
20		CARNIVAL CARPETS			(949)296-0567
21		CUSTOMER SERVICE			(949)296-0567
22	GARY SIMMS	COLOR TILE	(949)818-7171		(949)296-0567
23	GARY SIMMS	COLOR TILE	(949)818-7171		(949)296-0567
24	GARY SIMMS	COLOR TILE	(949)818-7171		(949)296-0567
25	RON ERIS	CRAN'S CONCRETE	(949)817-1017		(949)296-0567



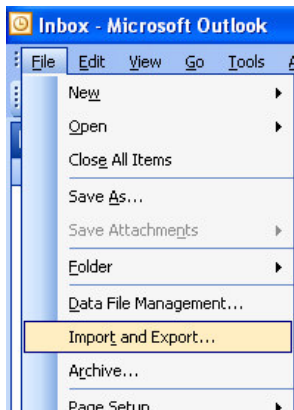
Creating a Folder in Outlook to Import into



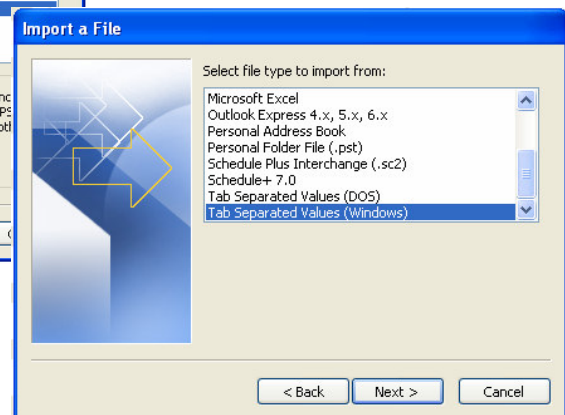
Now open Outlook and go to the Contacts Menu on the bottom left. When you do so the Contacts menu will open listing all of you contacts folders. Right Click on the main contacts menu and select **New Folder** so that you can create a folder to import your Subcontractors, Buyers, and/or Prospects. Give the folder whatever name you desire or use an existing folder if that is your preference.

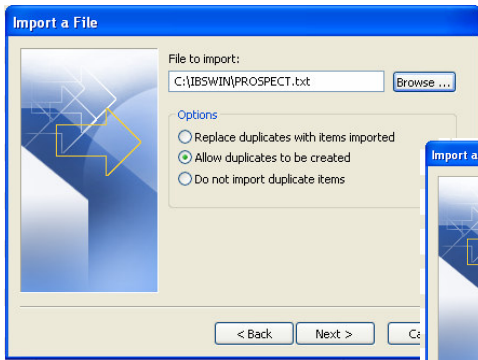


Importing your Excel file into Outlook

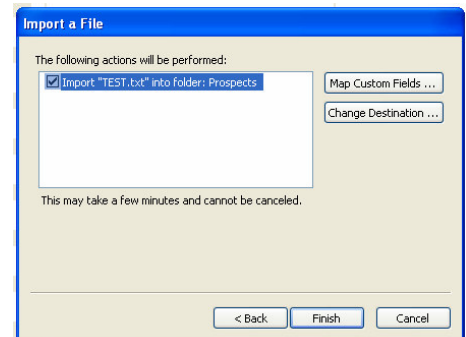
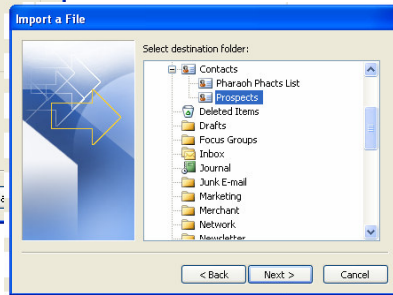


Now that you have the desired location for your contacts created go to the **File: Import and Export** menu. Then select **Import from another program or file** and press next. Then select **Tab Separated Values (Windows)** and press Next.

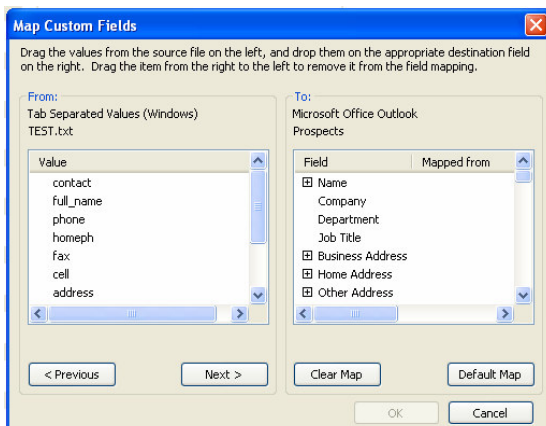




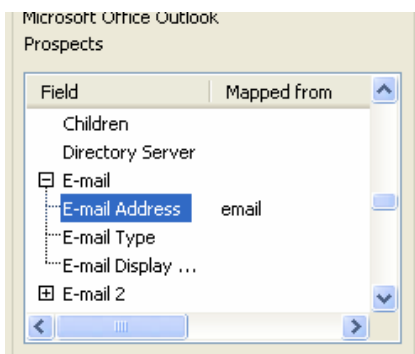
You will now be asked to select the file you wish to import. Using the Browse button find the Excel file. Once you have done this choose from the selection regarding importing of duplicate items. After clicking next then select the contact folder you wish to import into.



The next screen will prompt you to select check the file you are importing (if it is not already checked). You will now need to click on the **Map Custom Fields** button to ensure that the fields you wish to import will correspond to the same fields in Outlook. If you have done this before Outlook will remember the mapping selection.



To map your fields the process is simple. In the double pane window (pictured) on the left hand side it will list all the columns from your spreadsheet. On the right hand side it will list all of Outlook's fields. All that you have to do is drag the IBSWIN field from the left hand side and drop it into the **Mapped From** column to the corresponding Outlook **Field**. If you are only going to do this in Outlook for emails then you would only need to map the relevant name and email fields.



To the left is an example of the IBSWIN **email** field mapped to the **E-mail Address** field in Outlook. Once you have mapped everything that you need click OK and let Outlook import your contacts. Once complete they will now be accessible to use in Outlook.