- 1. From the Clarity dashboard, click on the BAREIS Plus Icon.
- 2. In BAREIS Plus, click on **Contacts** (1) and then select **Import Contacts** (2).

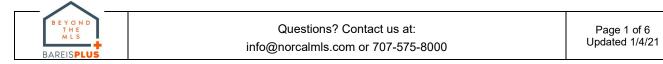


3. On the **Import Contacts** screen, the **Upload File** step is highlighted. Click on the **Choose File** (or **Browse**) button.

Import Contacts	
Upload File	Choose the file you would like to upload; then, click the "Upload" button
Select Group	2. Upload

 Prior to the BAREIS Plus launch, you exported your contacts from each of the MLS systems where you have Contacts and Prospects (may include BAREIS, MetroList, MLSL Matrix, Paragon, SFAR and Quattro). Navigate to your saved exported contacts .csv files (1), select one (2) and click on the Open button (3).

Upload File	Choose the file you would like to upload;	then, click the "Upload" button	
	1. Browse No file selected.		
Select Group	2. Upload		
	🔞 File Upload		
Map Fields	$\leftarrow$ $\rightarrow$ $\checkmark$ $\uparrow$ $\clubsuit$ > This PC > Do	ownloads v ව	∅ Search Downloads
	Organize 👻 New folder		
Resolve Conflicts	This PC	Name 254931_RESI_E0C6.csv	Date modified 12/2/2020 9:30 AM
	3D Objects	254931_RESI_E3B2.csv	12/1/2020 9:36 AM
Finish	Desktop	254931_RESI_E8B4.csv	12/4/2020 9:36 AM
	Documents	254931_RESI_E859.csv	11/30/2020 10:04 AN
	1 Uownloads	254931_RESI_EC1B.csv	11/30/2020 10:06 AN
	길 150-Custom-Color-Themes	254931_RESI_F244.csv	11/30/2020 10:08 AN
	263228 Contact 7D4.zip	254931_RESI_FA30.csv	11/30/2020 9:31 AM
	263228_Contact_F980.zip	263228_Contact_7D3.csv	12/4/2020 12:36 PM
	263228 Contact FD57.zip	263228_Contact_7D4.zip	12/4/2020 12:40 PM
	and the second	263228_Contact_F9B0.zip	12/3/2020 4:29 PM
	263228_Member_E84D.zip	263228 RESI BA4C.csv	12/1/2020 5:03 PM
	263228_Office_2815.zip	Contacts.csv	12/4/2020 11:56 AM
	J Music	WILS_Defined_spreadsneet_3 (3).	
	E Pictures	REB - Flyer 8 Photo.pdf	12/2/2020 2:11 PM
	📓 Videos 🗸	REB vs MLSL Export Basic (10).cs	v 12/1/2020 4:51 PM
	File name: Cont	arts rsv.	All Files (*.*)



5. On the Import Contacts screen, click the Upload button.

Import Contacts	
Upload File	Choose the file you would like to upload; then, click the "Upload" button
Select Group	1. Browse Contacts.csv 2. Upload

6. An upload confirmation is displayed (1). Click the **Next** button (2) in the upper left.

Back Next Cancel	
Import contacts	
Upload File	Contacts.csv uploaded successfully. Click the "Next" button at the top of the page to continue.

7. On the **Import Contacts** screen, the **Select Group** step is now highlighted. Two options for selecting a group are displayed with **Create New Group** selected.

Import Contacts		
Upload File	Create New Group     Description	
Select Group	Sort Order	
Map Fields	Prospects (0) V	

8. Click to select **Use Existing** (1) and view the options in the drop down (2).

This field reflects the system defaults or any custom groups you previously created.

Upload File	Create New Group Description	
Select Group	Sort Order	
Map Fields	Prospects (0) Prospects (0) Clients (0) Vendors (0)	
Resolve Conflicts	Personal (0) Other (1) Last Imported (0)	
Finish		

- 9. If you'd like the contacts in the .csv file you're importing to be added to one of the existing groups, make a selection from the drop down and go directly to Step 11.
- 10. If, instead, you'd like to create your own group based on, for example, the name of the system the contacts were exported from, click to select **Create New Group**.

Upload File	Create New Group			
	Description BAREIS			
Select Group	Sort Order 1			
	○ Use Existing			
Map Fields	Prospects (0) V			

### Description:

1. Enter a new label to help identify the contacts being imported.

Example: BAREIS (the MLS the contacts were exported from)

#### Sort Order:

2. Use the up or down arrow to select a number.

This required field allows you to specify where you want the new group to be placed in the Groups drop down list. Any number is accepted; a negative number will place it before all existing groups (at the top).

11. Click the **Next** button in the upper left.



12. The Map Fields step is now highlighted and all contact fields in the BAREIS Plus system are displayed. The drop down to the right of each field includes all contact fields in the .csv file you're importing. In this step, for each BAREIS Plus field, you'll select the corresponding imported field from the drop down. Detailed instructions are provided in the steps that follow. Please note that only fields highlighted in red are required.





13. Before you begin, there are four fields, marked in green below, that are not populated with imported values. We recommend keeping the defaults.

*First Name	~	*Status	Active 🗸	*Type Buyer 🗸
Last Name	×			6
Manage as Prospect				
Name on Reports				

- 14. In the First Name field (1), click the down arrow to the right and select First Name (2). Beginning with the Last Name field, continue to click the down arrow next to each field to locate the corresponding field in your imported .csv file.
  - If in one of the fields, a corresponding value does not appear in the drop down, that means the contacts .csv file you're uploading does not include that field. If so, skip that field and move on to the next field.

port Contacts				
Upload File	*First Name	-	Status Active ~	*Type Buyer 🗸
Select Group	Manage as Prosper Name on Reports Company Name	Ct Title First Name Middle Name	2	
Map Fields	City E-mail	Last Name Suffix	State	√ Zip

15. After making selections from the drop downs for each BAREIS Plus contact field, as applicable, click the **Next** button in the upper left. You may need to allow several minutes for the field mapping process to complete.

🚱 Back	🕄 Next	Cancel							
Import	Contacts								
Up	load File		*First Name Last Name	First Name  V SI Last Name  V	tatus	Active 🗸	*Туре	Buyer ~	
Se	elect Group		Manage as Prospec Name on Reports	t 🗹					
			Company Name Street Address	Company ~ Home Street ~					
Ma	ap Fields		City	Home City V	ate	Home State	Zip	Home Postal Code v Zip+4	~



- 16. The **Resolve Conflicts** step is now highlighted. In this step, the system lets you know if it detects duplicate contact names when comparing existing contacts in BAREIS Plus with your newly imported contacts.
  - If no duplicates were detected, there are no conflicts to resolve. Go directly to Step 17.
  - If the system detects duplicate contact names, you are given the option to Add, Overwrite or Skip a new contact. We recommend you select Add. After making a selection (1), click on the Next button (2) in the upper left.
    - Add: The system adds the imported contact.
    - **Overwrite**: The system replaces the existing contact with the imported contact.
    - Skip: The system skips (ignores) the imported contact.

	-			-	
Upload File	Existing Contac	t Imported Contac	Mod 🔽	Overwrite	Skip
	Brenda Carlson	Brenda Carlson	•		0
Select Group			0		
Map Fields			-		
Resolve Conflicts					

17. After resolving all conflicts, the No conflicts were found message is displayed. Click on the **Next** button in the upper left to finish importing your contacts.

Back Next Cancel	
Import Contacts	
Upload File	No conflicts were found. Click "Next" to finish importing your contacts.
Select Group	
Map Fields	
Resolve Conflicts	
Finish	

-		
BEYOND THE MLS BAREISPLUS	Questions? Contact us at: info@norcalmls.com or 707-575-8000	Page 5 of 6 Updated 1/4/21

18. The **Finish** step is now highlighted, and a confirmation message is displayed. Click on the **Click here** link to view your contacts.

Import Contacts	
Upload File	Congratulations! Your contacts have been imported into the system.
Select Group	Click here To view the contacts.
Map Fields	
Resolve Conflicts	
Finish	

19. On the **Contacts / Prospects** screen, this is your opportunity to verify your contacts. If the newly imported contacts are not displayed, in the **Filters** section in the upper left, select the **Group** you set the imports to, whether a new or existing group.

Exports	Options										?	₿
Conta	icts/Prospects		1 contact(s) found i	n Last Imported						c	) chec	cked
Active	Inactiv	e (0)										
Create Ne	w Contact Manage N	ewly Matched				ABCDEF	GHIJKLN	NOP	QR	sтu	v w	хүz
<ul> <li>Filters</li> <li>Group</li> </ul>	Last Imported (1) 🗸	· _				Search b	y Name, Code, o	r E-mail	P			
Nan Carl Brer B/	All Active (3) Last Imported (1)	Prospect Cart*	Auto-Prospecting/Portal	AP/Portal Activity**		Phone	Send	Tasks		CMA	BUY	NET
	BAREIS (1)	0 0 0 0	)					Û			BUY	NET
	Prospects (0) Clients (0)	*Prospect Cart counters: Newly Matched Listings / Agent Recommended / Saved Listings / Rejected Listings AP/Portal Activity column shows date/time of last activity: Green = 0-6 days / Yellow = 7-30 days / Red = 31+ days										
	Vendors (0) Personal (0)		Mobile Site Priva ation has not been verified, is not © 2020 Bay Area Real Estate Info Copyright ©2020 Rapattoni Co U.S. Patent	guaranteed, and ormation Services rporation. All right	, Inc. A	Il rights reserved	1.					
	Other (1)		Generated: 12/11/									

20. Repeat Steps 3 through 19 for each of the systems you exported contacts from prior to the BAREIS Plus launch.

