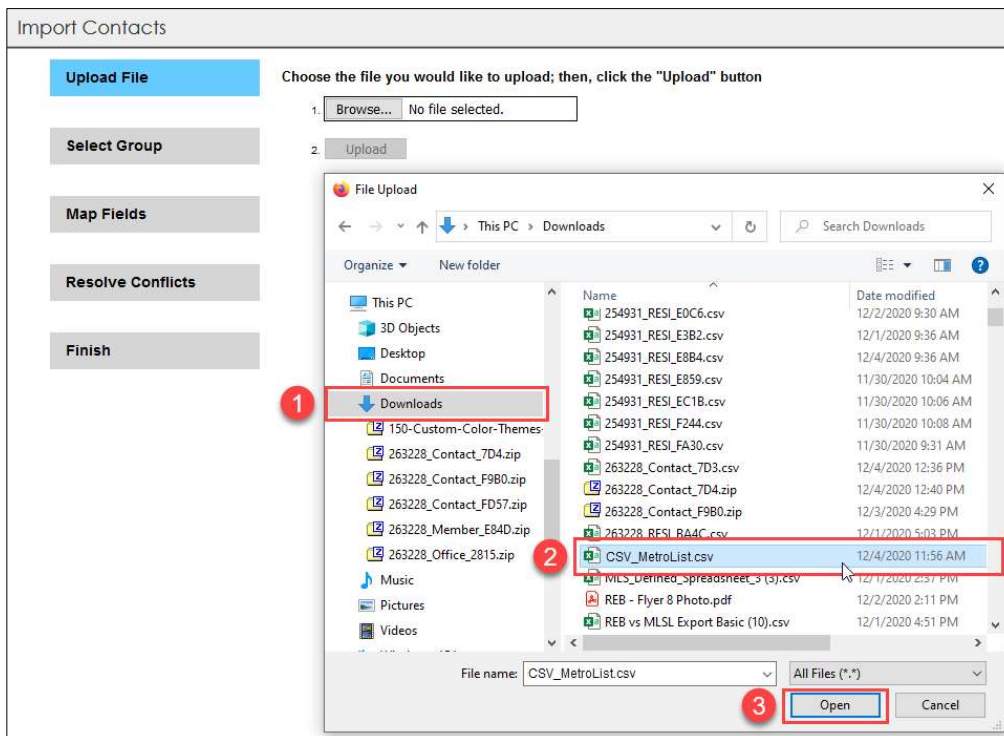1. Log in to BAREIS MLS. From the top menu bar, click on **Contacts** (1) and then select **Import Contacts** (2).



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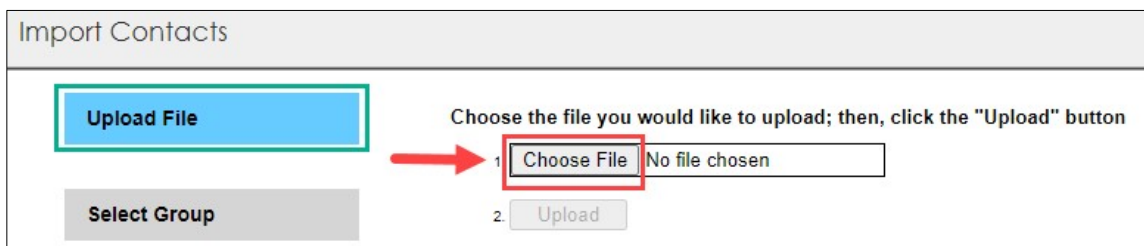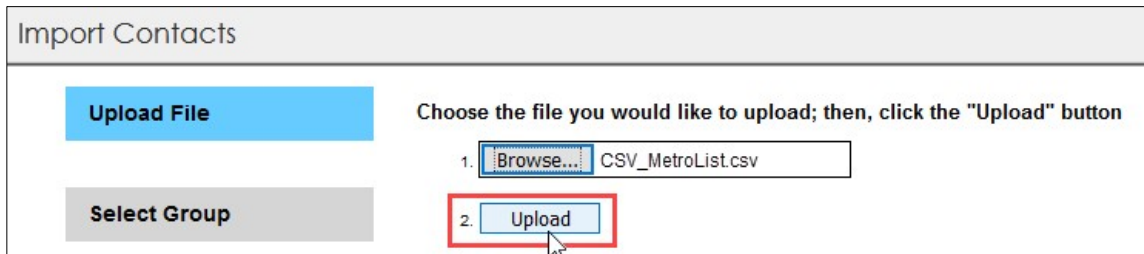


3. In preparation for the BAREIS Plus launch, you exported your contacts from each of the other MLS systems where you have Contacts and Prospects (may include MetroList, MLSL Matrix, Paragon, SFAR and Quattro). Navigate to your saved exported contacts **.csv files** (1), **select one** (2) and click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

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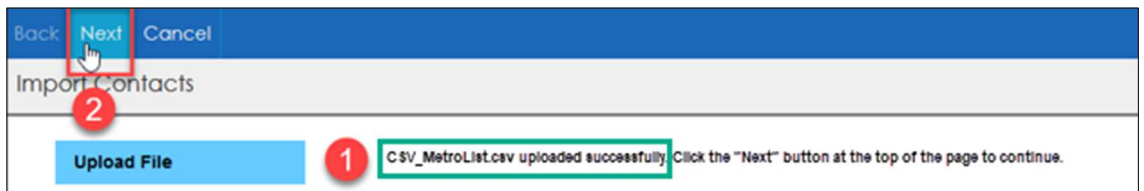info@norcalmls.com or 707-575-8000

Page 1 of 6
Updated 1/4/2021

4. On the **Import Contacts** screen, click the **Upload** button.



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



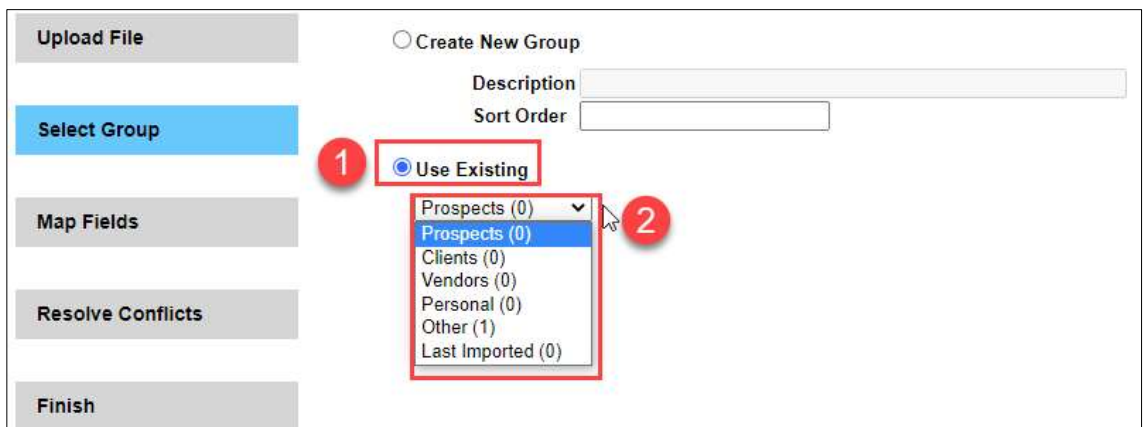6. On the **Import Contacts** screen, the **Select Group** step is now highlighted. Two options for selecting a group are displayed with **Create New Group** selected.



7. 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.
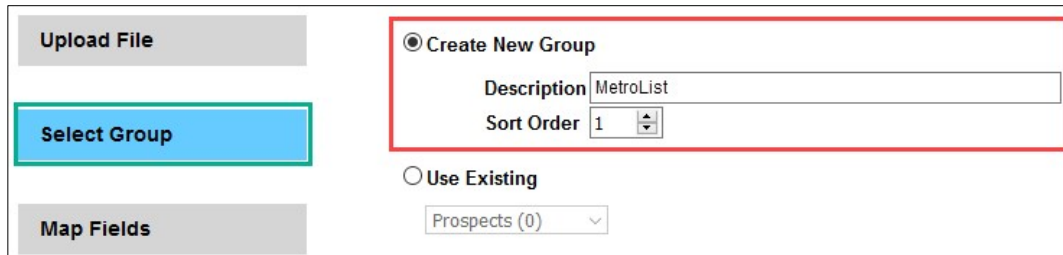
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Page 2 of 6
Updated 1/4/2021

8. 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 10.

9. 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**.



**Description**:

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

   Example: MetroList (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).

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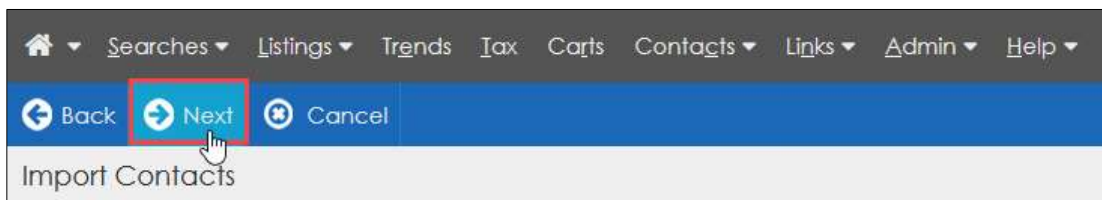


11. The **Map Fields** step is now highlighted and all contact fields in the BAREIS system are displayed. The drop down to the right of each field includes all contact fields in the .csv file you're importing. In this step, for each BAREIS field, you'll select the corresponding imported field from the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

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Page 3 of 6
Updated 1/4/2021

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



13. 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.



14. After making selections from the drop downs for each BAREIS 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.

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Page 4 of 6
Updated 1/4/2021

15. 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 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.



16. 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.

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Page 5 of 6
Updated 1/4/2021

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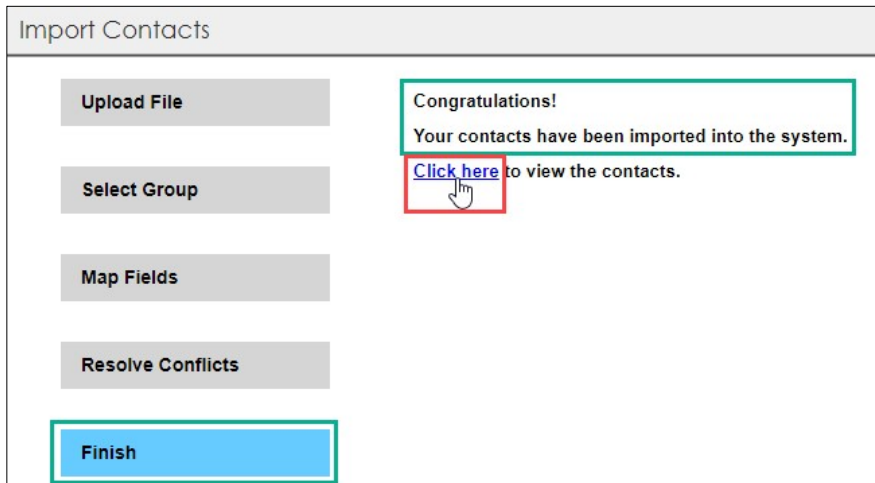


18. On the **Contacts / Prospects** screen, this is your opportunity to verify your contacts. If the newly imported contacts are not displayed, in the **Filters** section in the upper left, select the **Group** you set the imports to, whether a new or existing group.
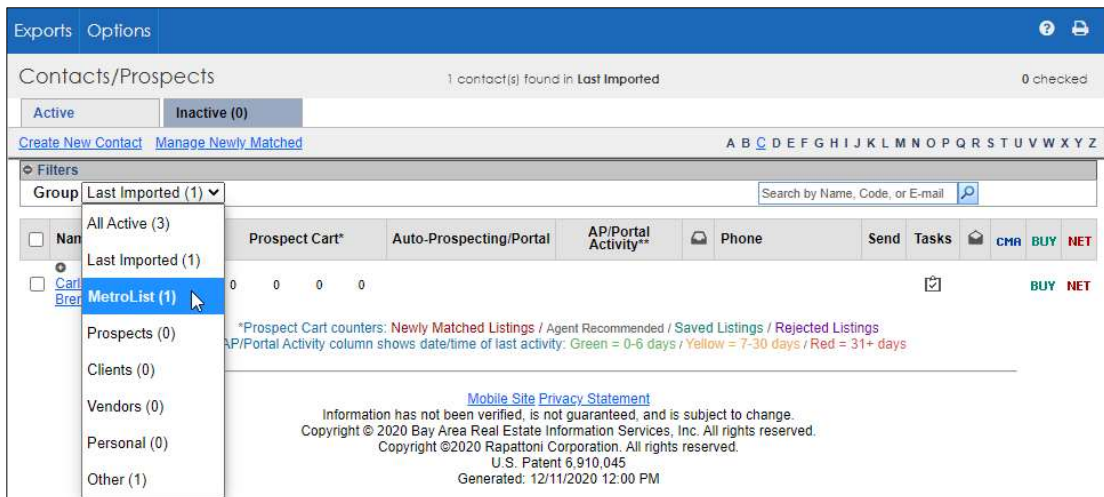


19. Repeat Steps 3 through 19 for each of the systems you exported contacts from prior to the BAREIS Plus launch.

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Page 6 of 6
Updated 1/4/2021