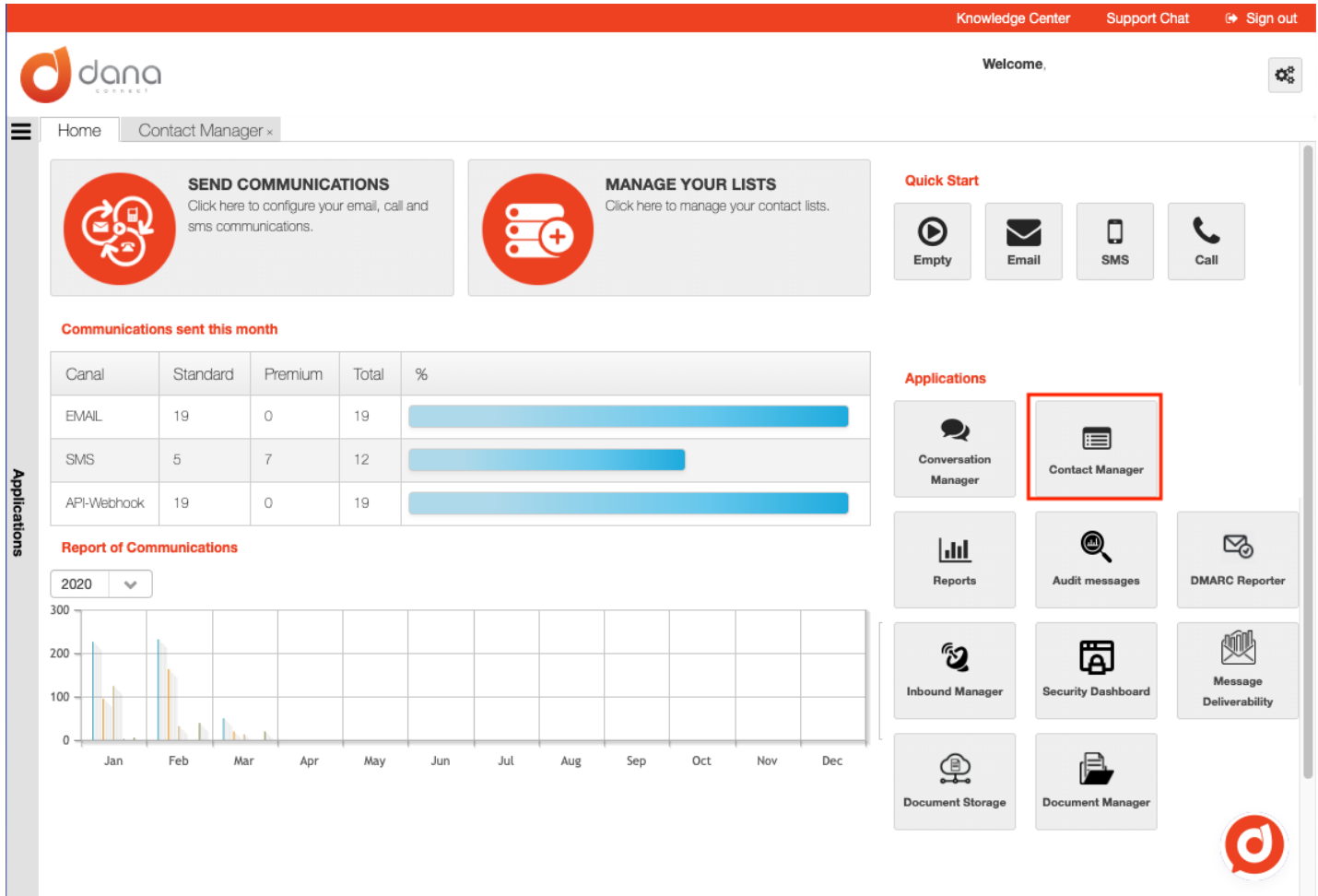


Create or Import a Basic Contact List

To start sending emails or SMS from your conversations, you have first to create a contact list with at least the email or phone numbers of the people you want to contact.

1. From the Home screen, click on the Contact Manager application icon



The screenshot displays the Dana CRM Home interface. At the top, a red navigation bar contains links for Knowledge Center, Support Chat, and Sign out. Below this, the Dana logo is on the left, and a 'Welcome,' message with a settings icon is on the right. A sidebar on the left lists 'Home' and 'Contact Manager'. The main content area features two large action cards: 'SEND COMMUNICATIONS' and 'MANAGE YOUR LISTS'. Below these is a table titled 'Communications sent this month' showing data for EMAIL, SMS, and API-Webhook. Further down is a 'Report of Communications' section with a bar chart for the year 2020. On the right, a 'Quick Start' section includes buttons for Empty, Email, SMS, and Call. Below that, an 'Applications' grid contains icons for Conversation Manager, Contact Manager (highlighted with a red box), Reports, Audit messages, DMARC Reporter, Inbound Manager, Security Dashboard, Message Deliverability, Document Storage, and Document Manager. A Dana logo is in the bottom right corner.

Communications sent this month

| Canal | Standard | Premium | Total | % |
|-------------|----------|---------|-------|---|
| EMAIL | 19 | 0 | 19 | |
| SMS | 5 | 7 | 12 | |
| API-Webhook | 19 | 0 | 19 | |

Report of Communications

2020

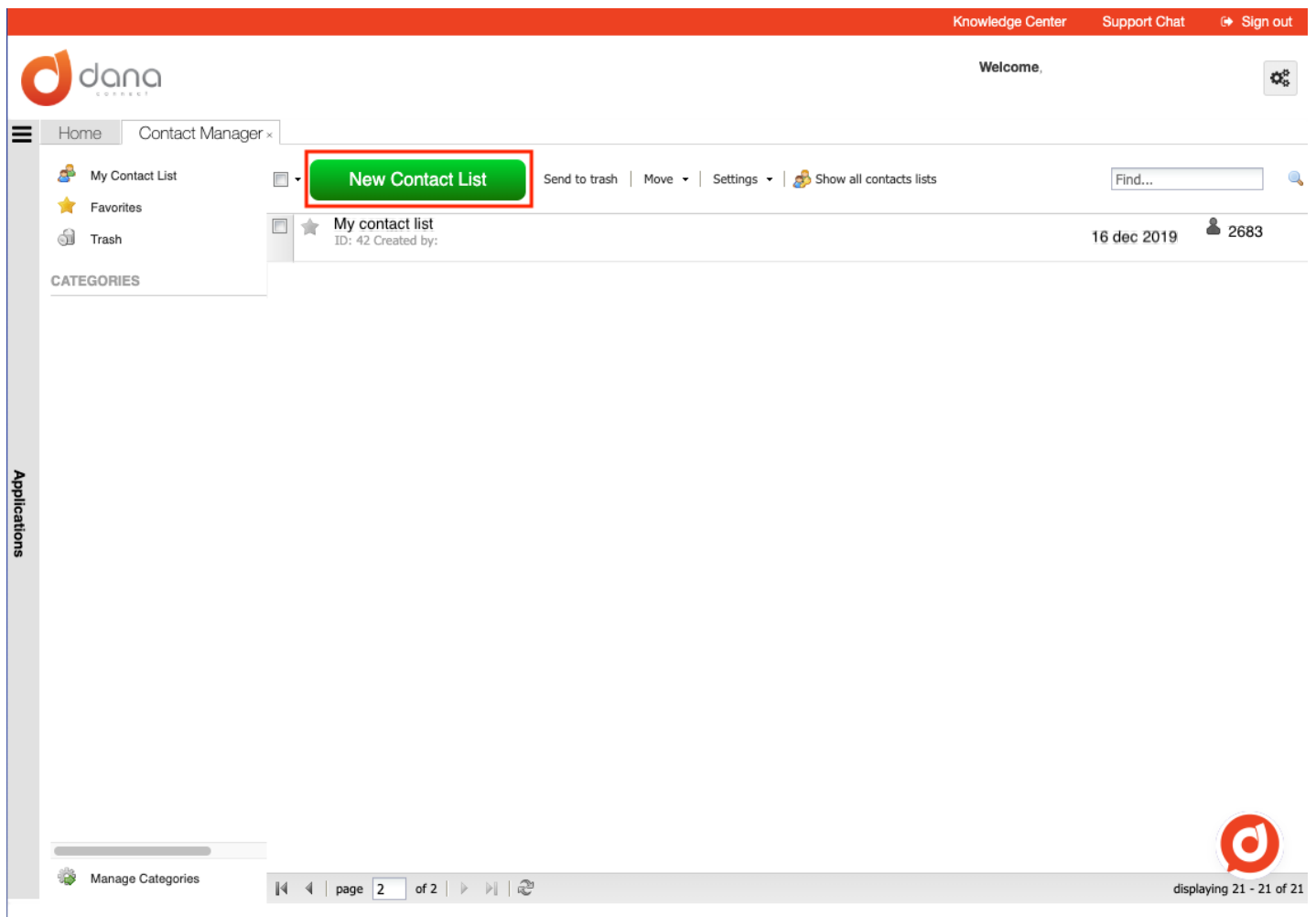
300
200
100
0

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec


Applications

- Conversation Manager
- Contact Manager**
- Reports
- Audit messages
- DMARC Reporter
- Inbound Manager
- Security Dashboard
- Message Deliverability
- Document Storage
- Document Manager

2. Click on New Contact List



3. In the next screen you get a basic Contact List configuration. Give a name your Contact List and click on Create.

 You can add

4. Click on "Import" to import your list or you can also add the data manually by clicking on "New Record".



Welcome.



Home Contact Manager x

My First Contact List



New Record Delete Import Export Operations Show All New Segment Find... UID

UID Name Last Name Email Phone

No Records

To add a new record, press the button **New Record** in the top toolbar.

Applications



page 0 of 0

No data to display

5. Click on "Upload" and then on "Browse" to upload a CSV or an Excel file from your computer.



Select Source...



Upload from File





Copy/Paste from Excel



6. Click on the blue "Import" button

Select Source...


Upload from File


Copy/Paste from Excel

Browse...

Selected: C:\fakepath\My customers.csv

Import

7. You will be prompted to a window where you have to match the columns in your uploaded list to your contact list. In the "Separated by" dropdown menu select the kind of punctuation used to separate the fields in the file you have uploaded. Comma is the most common separator.

Knowledge CenterSupport ChatSign out

Welcome, farroyo
Venturestars

HomeContact Manager x

My First Contact List

Select Source...

Upload from File

Copy/Paste from Excel

Almost done. Now lets match the columns in your uploaded list to your contact list.

Name

Selected by system

Jenine,Brockett,jbrockett0@nju.edu,8429148

Agata,Ellington,aellington1@widey.ca,468502

Carlyle,Massie,cmassie2@mtb3.ca,277760880

Vitoria,Louedey,vlouedey3@mozilliar.org,6361

Hobey,Meadway,hmeadway4@hallo123.co,65

Lynette,Chapple,lchapple5@redoit.cal,818347

Encoding:

Detected by system

Separated by:

Tab

Delimiter:

Tab

Options:

Comma

☒ File includes

☐ Force inserts in case of failure

Back

Done

8. Now you will see a similar window with the columns already separated and sorted. At this point, DANAconnect automatically maps the columns in your uploaded file with the columns in your Contact List.

Knowledge Center
Support Chat
Sign out

Welcome,

Home
Contact Manager x

My First Contact List

Select Source...

Upload from File

Copy/Paste from Excel

Almost done. Now lets match the columns in your uploaded list to your contact list.

| Name Selected by system | Last Name Selected by system | Email Selected by system |
|----------------------------|---------------------------------|-----------------------------|
| Jenine | Brockett | jbrockett0@nju.edu |
| Agata | Ellington | aellington1@widey.ca |
| Carlyle | Massie | cmassie2@mtb3.ca |
| Vitoria | Louedey | vlouedey3@mozilliar.org |
| Hobey | Meadway | hmeadway4@hallo123.co |
| Lynette | Chapple | lchapple5@redoit.cal |

Encoding: Detected by system
Separated by: Comma
Delimiter: Double Quotes
Options: Insert all records
☒ File includes headers with field names
☐ Force inserts in case of failure

Back
Done

In some cases the names don't match, so you have to make the mapping manually by selecting the name of the column in the dropdown menu.

| Not mapped Not mapped | Last Name Selected by you Unmap Ok >> | Email Selected by system |
|--------------------------|--|-----------------------------|
| Jenine | Brockett | jbrockett0@nju.edu |
| Agata | Ellington | aellington1@widey.ca |
| Carlyle | Massie | cmassie2@mtb3.ca |
| Vitoria | Louedey | vlouedey3@mozilliar.org |
| Hobey | Meadway | hmeadway4@hallo123.co |
| Lynette | Chapple | lchapple5@redoit.cal |

9. Click on the "Done" button when you are finished mapping the columns.

| Name Selected by you | Last Name Selected by you | Email Selected by system |
|-------------------------|------------------------------|-----------------------------|
| Jenine | Brockett | jbrockett0@nju.edu |
| Agata | Ellington | aellington1@widey.ca |
| Carlyle | Massie | cmassie2@mtb3.ca |
| Vitoria | Louedey | vlouedey3@mozilliar.org |
| Hobey | Meadway | hmeadway4@hallo123.co |
| Lynette | Chapple | lchapple5@redoit.cal |

Encoding: Detected by system

Separated by: Comma

Delimiter: Double Quotes

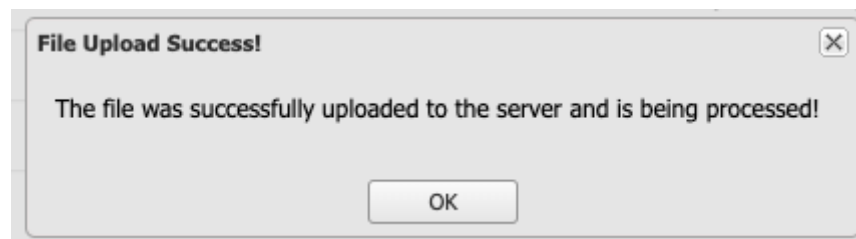
Options: Insert all records

☒ File includes headers with field names

☐ Force inserts in case of failure

Back Done

10. You get a confirmation message saying the file was uploaded. Click on ok.



11. Your Contact list is ready to start sending messages.



Welcome,



Home Contact Manager x

My First Contact List



| New Record Delete Import Export Operations Show All New Segment Find... UID | | | | | |
|---|------------|---------------|--------------------------------|------------|--|
| UID | Name | Last Name | Email | Phone | |
| 1 | Jenine | Brockett | jbrockett0@nju.edu | 8429148229 | |
| 2 | Agata | Ellington | aellington1@widey.ca | 4685020593 | |
| 3 | Carlyle | Massie | cmassie2@mtb3.ca | 2777608801 | |
| 4 | Vitoria | Louedey | vlouedey3@mozilliar.org | 6361882963 | |
| 5 | Hobey | Meadway | hmeadway4@hallo123.co | 6559342021 | |
| 6 | Lynette | Chapple | lchapple5@redoit.cal | 8183477569 | |
| 7 | Neddie | Arnaldy | arnaldy6@ezinearticles.com | 5233346357 | |
| 8 | Catlin | Monard | cmonard7@tripod.com | 5004850843 | |
| 9 | Tobe | Sivyer | tsivyer8@wiley.com | 7147074791 | |
| 10 | Codi | Corfield | ccorfield9@latimes.com | 3231543732 | |
| 11 | Edgard | Seekings | eseeekingsa@sina.com.cn | 3117822738 | |
| 12 | Tobit | Prozescky | tprozescky@b@google.nl | 5999046288 | |
| 13 | Gay | Rawcliff | grawcliffc@diigo.com | 6167786751 | |
| 14 | Alessandro | Harbour | aharbourd@opensource.org | 1094952897 | |
| 15 | Nero | Gutridge | ngutridgee@goo.ne.jp | 8821418141 | |
| 16 | Claiborne | Pirri | cpirrif@slate.com | 7469197972 | |
| 17 | Dorian | Hammerstone | dhammerstoneg@wunderground.com | 8629082536 | |
| 18 | Fielding | Nickerson | fnickersonh@devhub.com | 4566840091 | |
| 19 | Jorie | de Aguirre | jdeaguirrei@de.vu | 3354495798 | |
| 20 | Gregg | Mercy | gmercyj@stumbleupon.com | 4881588045 | |
| 21 | Rosalia | McAdam | rmcadamk@ehow.com | 2114381153 | |
| 22 | Chrisse | Alstead | calsteadl@google.ru | 2375744109 | |
| 23 | Rorke | St. Queintain | rstqueintainm@dion.ne.jp | 7557945808 | |
| 24 | Alisander | Dunsire | adunsiren@hupages.com | 1056969467 | |
| 25 | Justus | Macvey | jmacveyo@chicagotribune.com | 7052352062 | |