# Contacts: Overview, Setup, and Import Guide

| Step 1: Evaluate Your Systems | Step 2: Analyze Your Database | Step 3: Prepare Command | Step 4: Add Your Contacts |
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| **What are your goals and pain points?**<br>☐ List the systems which feed your existing database (CRM, lead generation, marketing platforms, phone/contact apps/social media).<br>☐ Write down the current pain points when managing contacts and business processes in your current systems.<br>☐ Consider how adding Contacts in Command can benefit your business and your clients.<br>☐ Envision how you ultimately want to run your business, using Command—set goals for how you will transition your business to Command. | **How are you currently managing your database?**<br>☐ Examine how you currently handle contact records for related individuals (partners, spouses, family members).<br>☐ Examine the standard data fields in the existing system. Compare these fields to the fields in the Command Contact card.<br>☐ Make a list of any Custom Tags you currently use in the system.<br>☐ Clean up your existing database. Evaluate the quality of the data—remove duplicates, ensure email addresses, physical addresses, phone numbers, and so on are present.<br>☐ Determine the export format allowed by the system. | **How should you customize Command to accommodate Contact data?**<br>In Command Settings:<br>☐ Create any Custom Fields and Custom Tags needed.<br>☐ Review the list of applications which can be connected directly to Command.<br>☐ Review the list of CRMs and applications which can be synced via PieSync.<br>☐ Determine which applications (social, productivity, marketing) you want to connect directly to Command.<br>☐ Clean up existing contacts in Command and archive any test contact records. | **Where do you begin?**<br>☐ Connect chosen applications to Command: Settings > Applications.<br>☐ Select the best method to import or add Contacts:<br>▪ If your system is supported by PieSync, use PieSync.<br>▪ If the previous option doesn't apply, use the Command Contact Import Template: Command > Contacts > Import > Download (save as .CSV)<br>▪ Or add contacts manually in Command and Kelle. |
| **Key considerations:**<br>▪ Have you structured your business processes around the system, or is the system built for you?<br>▪ How does each system or app communicate with other systems? Do the systems make you and your clients smarter?<br>▪ Does this system need to be running concurrent with Command for a time? Or can you stop using it now | **Key considerations:**<br>▪ Do contact records for partners, spouses, or households need to be separated into individual records to be compatible with Command? Command allows you to set relationships between records.<br>▪ Do Custom Fields need to be created in Command so the data in the existing system has a placeholder in Command?<br>▪ Which Custom Tags need to be created in Command? Which tags in the existing system are no longer needed? | **Key considerations:**<br>▪ Which contacts do you want to add in Command? Consider starting small by adding Contacts for the deals in your current pipeline.<br>▪ Which data fields and tags in your current systems are no longer needed, given the capabilities of Command?<br>▪ If using PieSync, do you need information to sync both ways between Command and the system going forward, or is a one-time, one-direction sync needed? | **Resources:**<br>▪ KWU Help articles in Command: Command > Contacts > Question mark icon<br>▪ How-to Videos on KWConnect: Command > Settings > Command Training<br>▪ Help videos on KW PieSync Support Center<br>▪ KW Support (Chat or leave a message): Command > Support button |

 