

How to import contacts of companies or individuals through eGO Real Estate?

Import contacts easily from an Excel document into eGO.
To do this you must follow the following steps:

1. Open a new Excel file and create columns with different fields to put the contact information. These are the fields you can import into eGO:

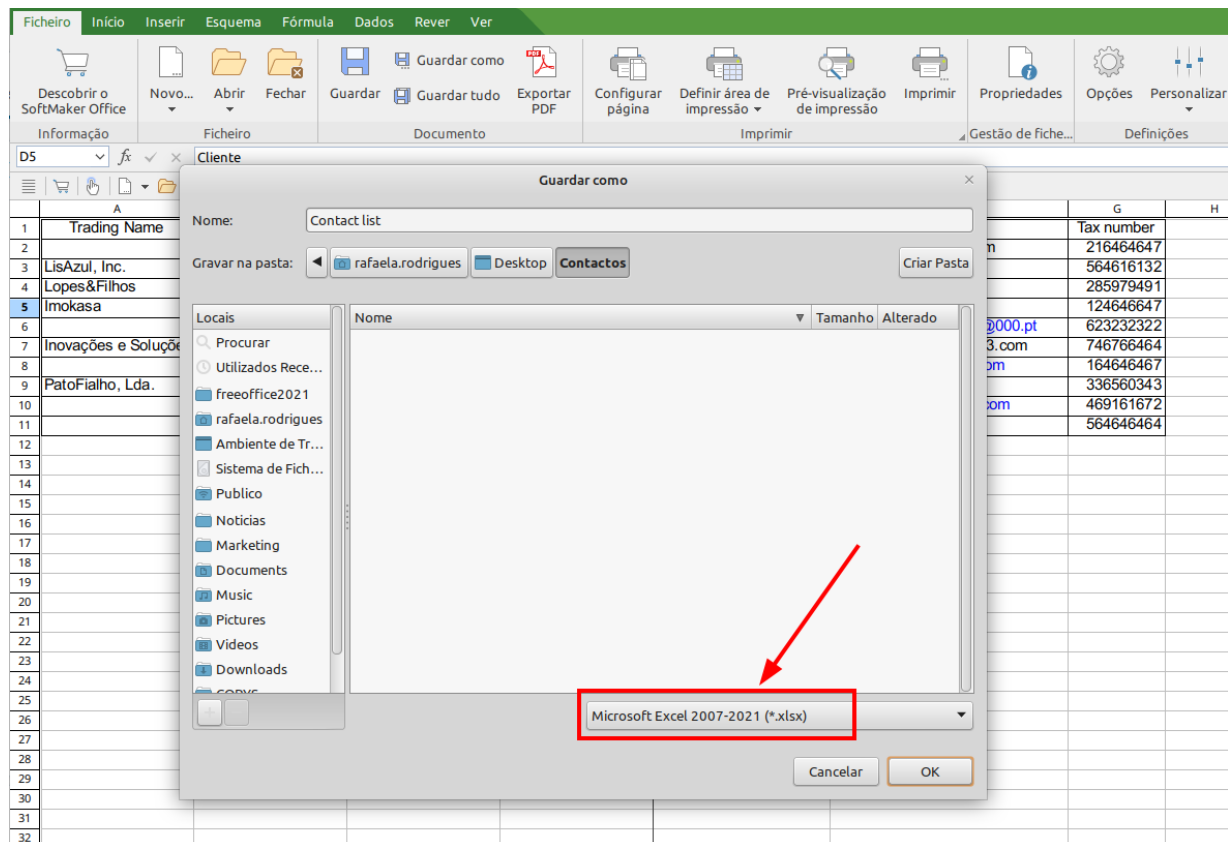
- Person or Company (**this field will allow you to import the contact, either as a new singular person contact, or as a new company contact**);
- First Name (**mandatory column**. It must be the first name of a singular person or the commercial name of the company);
- Last name;
- Date of Birth;
- Phone number;
- Email;
- Address;
- Zip Code;
- Country;
- District;
- Town;
- Neighborhood;
- Tax number;
- Marital status;
- Identification;
- Gender;
- Title;
- Tags;
- Type;
- Origin;
- Sub origin;
- Nationality;
- Job title;
- Observations;
- Activity branch;
- Trading name (**in a particular person contact this field should not be filled in**, since it is only required for Company contacts).

3. To distinguish between contacts from companies or singular persons, you must fill, in the column with the field defined for that purpose, the term "Person" or "Company".

If it is a contact from a singular person, you should leave the field "Trading Name" blank, as in the example below:

Trading Name	Name	Type of contact	Type of client	Phone Number	Email	Tax Number
	Carlos Teixeira	Person	Potencial client	264242777	carlosteixeira@123.com	216464647
LisAzul, Inc.	LisAzul, Inc.	Company	Potencial client	946317247	lisazul120@sjajak.pt	564616132
Lopes&Filhos	Lopes&Filhos	Company	Client	243567125	lopesfilhos@2o4.com	285979491
Imokasa	ImoKasa	Company	Client	938253758	imokasa@jaal.com	124646647
	Olivia Martins	Person	Owner	913427498	Oliviamarquesmartins@000.pt	623232322
Inovações e Soluções	SoluçãoInovadora	Company	Client	978431208	Soluçoinovadora@123.com	746766464
	Ofélia Queiroz	Person	Salesman	246838912	ofelia_queiroz@asisk.com	164646467
PatoFialho, Lda.	PatoFialho, Lda.	Company	Potencial client	943177314	patofialho@hpf.pt	336560343
	Ana Santos Lopes	Person	Manager	214967943	analopes-geral@030f.com	469161672
	Rui Patrício	Person	Salesman	216427965	ruipat@qjwe.com	564646464

4. Save the file in XLSX format.



5. Go to the "Contacts" Menu in eGO Real Estate.

The screenshot displays the eGO Real Estate CRM interface. On the left, a dark sidebar contains navigation icons for Dashboard, Opportunities, Properties, Contacts (highlighted in blue), Leads, and More. The main header shows the company name 'Primeiro Real Estate' and the user profile 'RR Rafaela Rodrigues'. The main content area is titled '100 Contacts' and features a search bar with the placeholder '(Name, Email, Phone)' and an 'Advanced search' link. Below the search bar are pagination controls (1-7) and an 'Order by' dropdown. A 'New person' button is located in the top right of the main area. The contact list shows four entries:

- Rafaela Rodrigues** (Client): Created at Friday. Includes a 33% progress indicator and icons for survey, newsletter, and other actions.
- Leonel Jacob** (Informer): Created at 06 Jul. Includes a 33% progress indicator and similar action icons.
- Liliana Pereira** (Potential Client): Created at 03 May. Includes a 33% progress indicator and similar action icons.
- Rodrigo Ralha** (Real Estate Agent): Created at 07 Jun 2021. Includes a 33% progress indicator and similar action icons.

The right-hand sidebar contains several filter sections:

- CUSTOM SEARCHES**: 'Create a custom search'.
- QUICK SEARCH**: 'Role' (Client, Informer, Owner), 'Potential Client', and 'Only' (Next month's birthdays).
- CAMPAIGNS**: 'Campanha cliente lux', 'Newsletter Base Imóveis' (repeated three times).
- TAGS**: A list of tags including 'Aniversário do cliente', 'Apartamento | T1', 'Apartamento | T2', 'Apartamento | T3', 'Apartements', 'Blocked Newsletter', 'Blocked Email', 'Blocked SMS', 'Cascais', 'imoveis_caldasrainha', 'Investidores', 'Lisboa', 'Localização | Caldas da Rainha', 'Localização | Cascais', 'Localização | Lisboa', 'Moradia | T1', 'Moradia | T2', 'Moradia | T3', 'Piscina', 'Subscribed Newsletter', and 'Website'. It also includes options to 'Add by key', 'Import contacts through file', and 'Import contacts from Google'.

6. On the right hand side, below the search labels, click on "Import contacts through file".

The screenshot displays a CRM interface for 'Primeiro Real Estate'. The main area shows a list of 100 contacts, with the first four visible: Rafaela Rodrigues (Client), Leonel Jacob (Informer), Liliana Pereira (Potential Client), and Rodrigo Ralha (Real Estate Agent). Each contact card includes a profile picture, name, role, and creation date. The right sidebar contains search filters under 'CUSTOM SEARCHES', 'QUICK SEARCH', 'CAMPAIGNS', and 'TAGS'. A red arrow points to the 'Import contacts through file' option in the sidebar, which is highlighted with a red box.

Primeiro Real Estate

Support

Rafaela Rodrigues

100 Contacts

Recently updated contacts and companies.

New person

(Name, Email, Phone)

Advanced search

1 2 3 4 5 ... 7

Select all Clear

Send survey Send newsletter

Rafaela Rodrigues Client

33%

Add new tag

Created at Friday

Surveys Sent by email Opportunities Visits Owner Process management

Leonel Jacob Informer

33%

Add new tag

Created at 06 Jul

Surveys Sent by email Opportunities Visits Owner Process management

Liliana Pereira Potential Client

33%

Add new tag

Created at 03 May

Surveys Sent by email Opportunities Visits Owner Process management

Rodrigo Ralha Real Estate Agent

33%

Add new tag

Created at 07 Jun 2021

Surveys Sent by email Opportunities Visits Owner Process management

CUSTOM SEARCHES

Create a custom search

QUICK SEARCH

Role Client Informer Owner

Potential Client

Only Next month's birthdays

CAMPAIGNS

Campanha cliente lux

Newsletter Base Imóveis

Newsletter Base Imóveis

Newsletter Base Imóveis

TAGS

A Aniversário do cliente

Apartamento | T1

Apartamento | T2

Apartamento | T3 Apartements

B Blocked Newsletter

Blocked Email Blocked SMS

C Cascais

I imoveis_caldasrainha

Investidores

L Lisboa

Localização | Caldas da Rainha

Localização | Cascais

Localização | Lisboa

M Moradia | T1 Moradia | T2

Moradia | T3

P Piscina

S Subscribed Newsletter

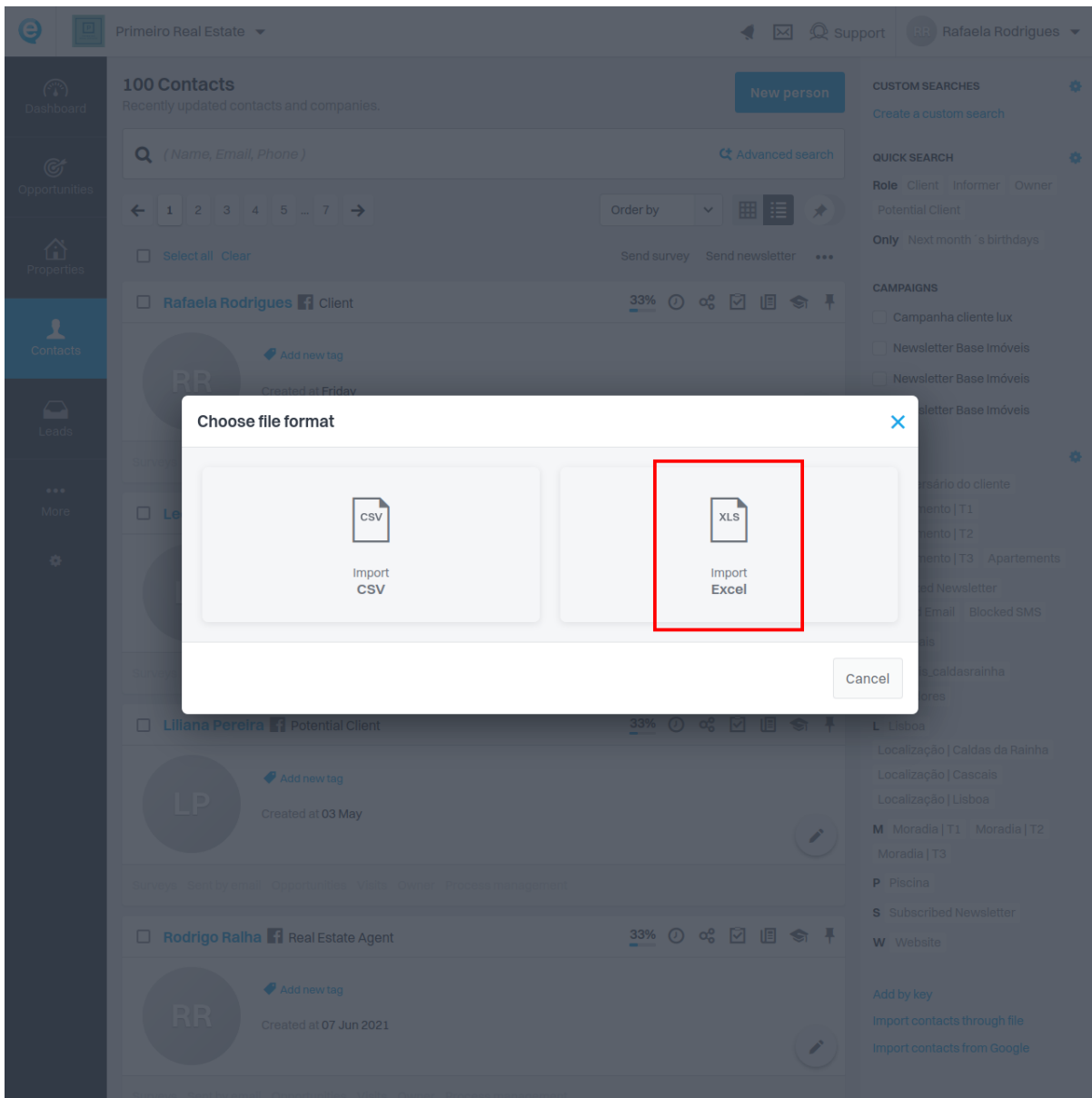
W Website

Add by key

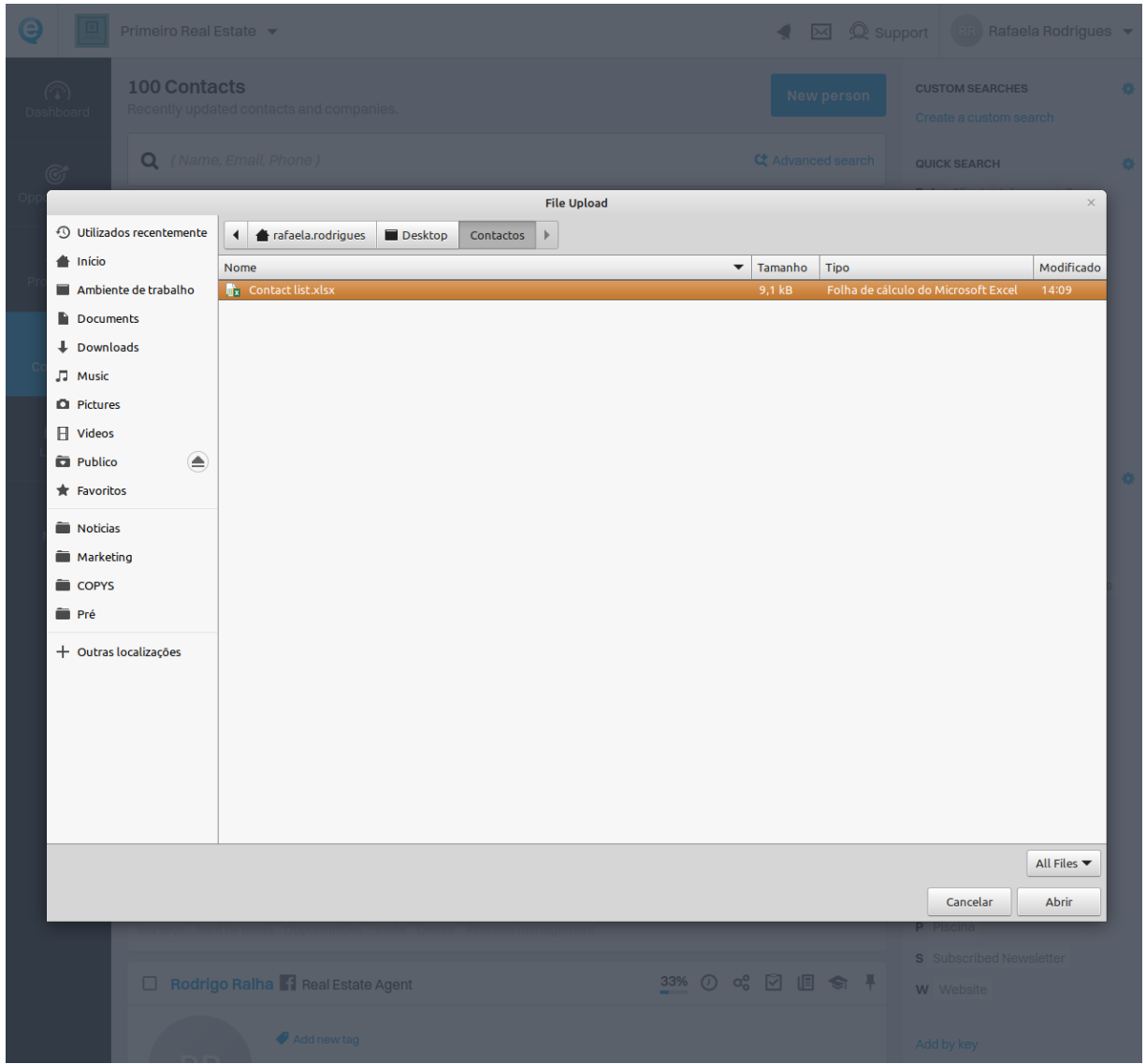
Import contacts through file

Import contacts from Google

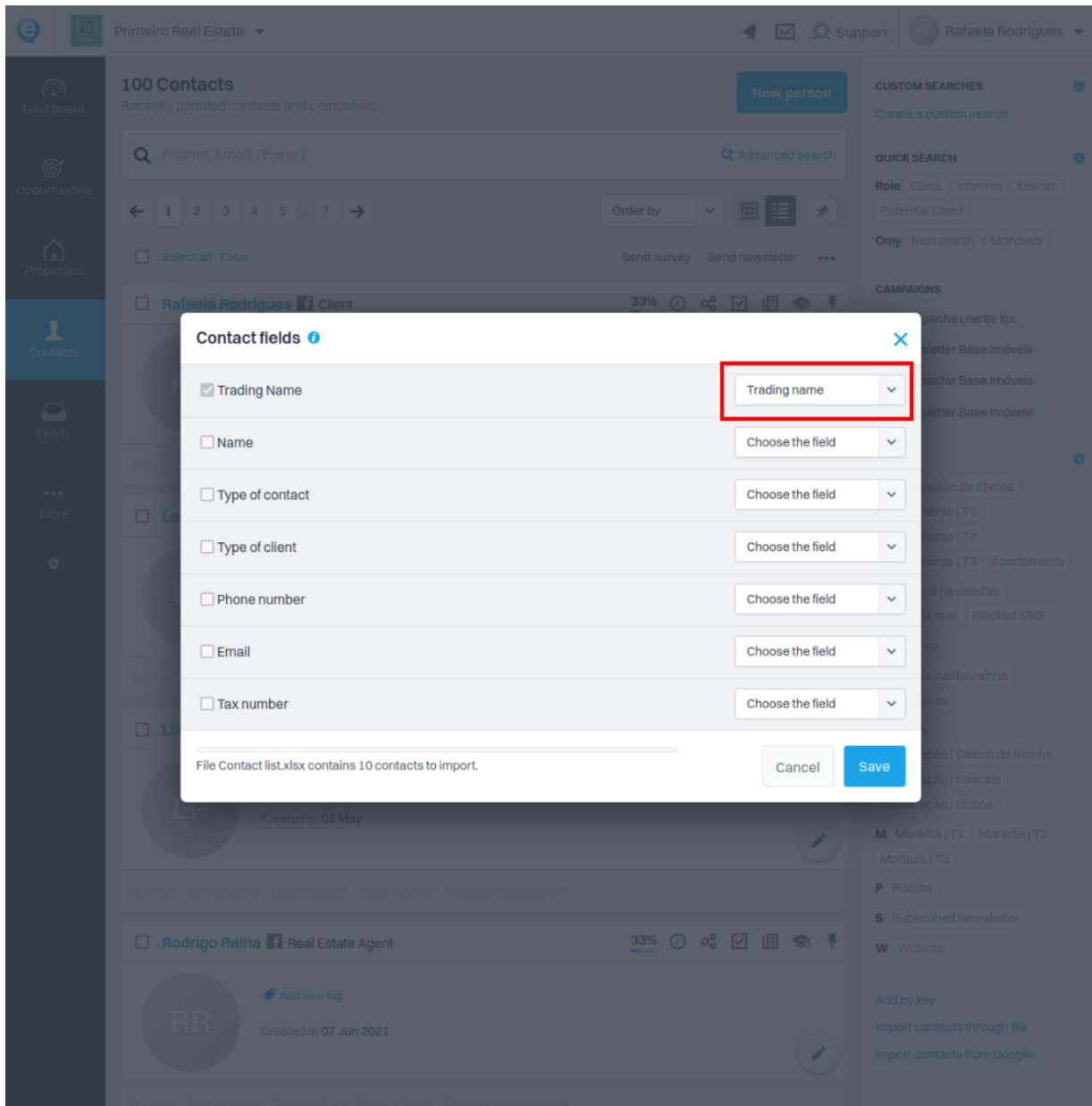
7. Select the "Import Excel" option.



8. Choose the previously saved Excel document.

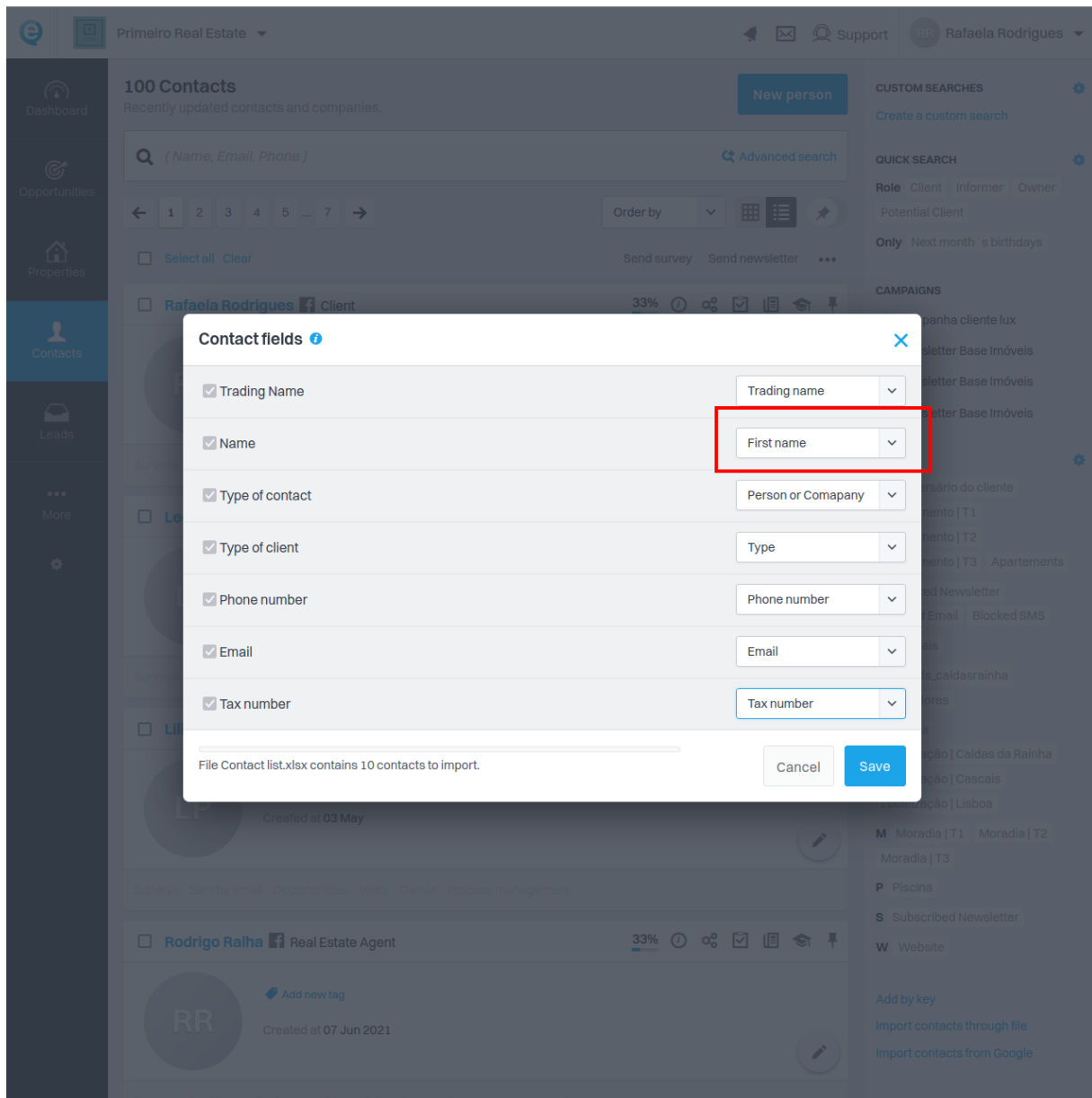


9. Match the columns in your file with the fields in the eGO Contacts.



10. The "First Name" field must match with the imported contacts. In the case of a singular person, it will be the first name; in the case of a company contact, it will be the business name.

This information should be filled in the same column for both types of contact.



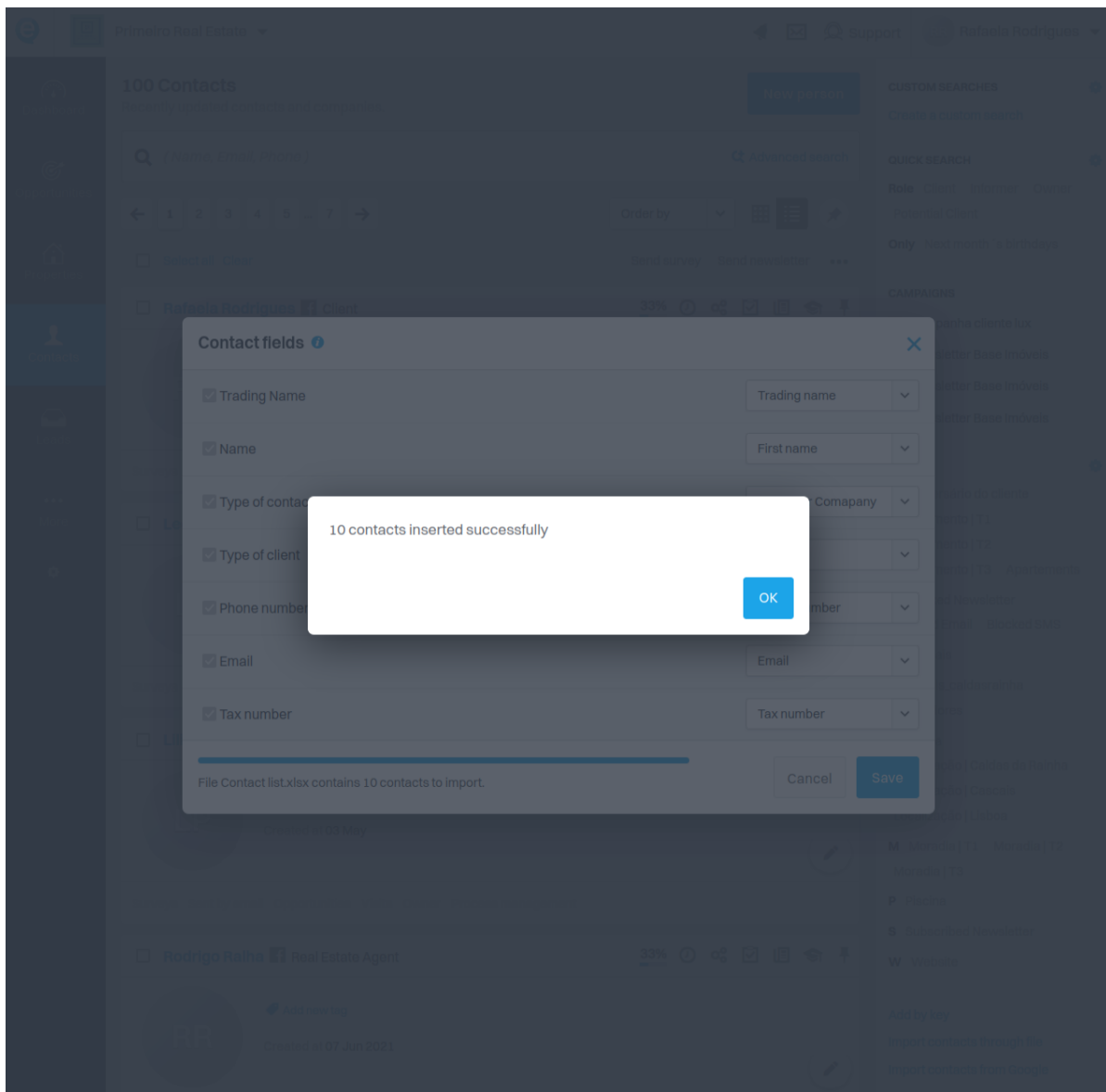
11. Once you have finished matching the columns in your file with the fields in the eGO contacts, click "Save".

The screenshot displays the eGO contacts management interface. A modal dialog titled "Contact fields" is open, allowing users to map columns from an imported file to specific contact fields. The dialog includes the following fields and their corresponding dropdown menus:

- Trading Name: Trading name
- Name: First name
- Type of contact: Person or Comapany
- Type of client: Type
- Phone number: Phone number
- Email: Email
- Tax number: Tax number

At the bottom of the dialog, a status message reads: "File Contact list.xlsx contains 10 contacts to import." Below this message are two buttons: "Cancel" and "Save". The "Save" button is highlighted with a red rectangular box, and a red arrow points to it from the right side of the screen.

12. When the import is complete, you will receive this indication:



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<https://academy.egorealestate.com>

 support@egorealestate.com