Exporting Contacts Out of ZAP

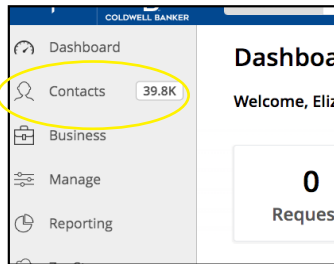## Getting Contacts Out of ZAP

Export Contacts Out of ZAP

- Log in to www.CBDesk.com
  Use your agent.name@ColdwellBanker.com email

- Click on the icon
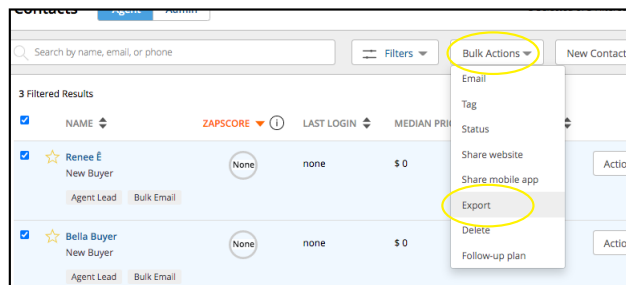
- Click Contacts in the left navigation bar

- Click the box to the left of the Name Column
  This will select all names/contacts
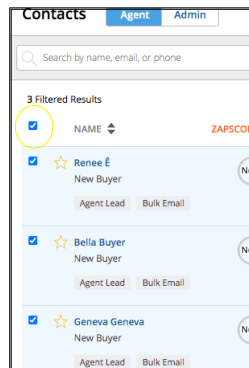
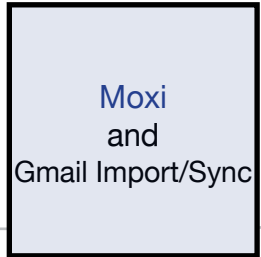- Click Bulk Actions to expand it

- Click Export

- Click Export again

- The spreadsheet with contacts downloads to your computer. You will use this file to copy and paste your contact data to the upload csv spreadsheet provided by the platform you are uploading to. Two options below.
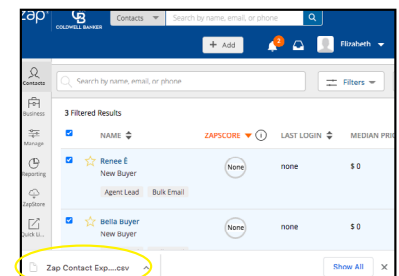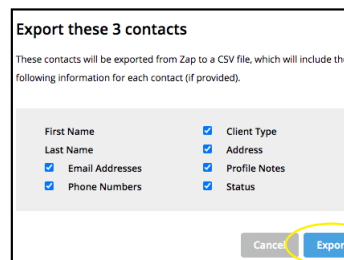
- For best upload results placing all client information correctly, use the upload csv spreadsheet provided by Google. Simply copy the columns from the whatever spreadsheet you have your contacts on and paste to the matching column on the Google upload spreadsheet. Save your new Google csv spreadsheet and move to step 2.
- **Click here** for the Google upload csv template and guide.
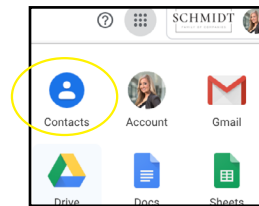
Moxi and Gmail Import/Sync

- Log in to your company Gmail
Use your agent.name@CBSchmidtOhio.com email
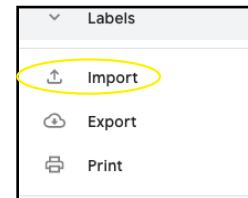(To use your personal Gmail, see notes on top of page 2)
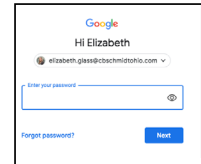
- Click on the GSuite Apps icon on top right

- Click on the Contacts icon

- Click the Import option on the left side navagation panel

- A box pops up. Click No Label
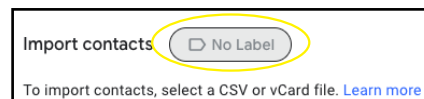
- Enter a label for your import. Ex: CBx Seller Leads
(To add to a previously made label, check that box)
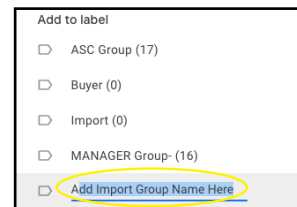
- Click Select File
- Go to the folder / location of your csv, select, and click Open
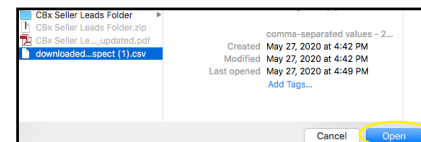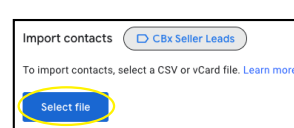
- Your selected file will now show. Click Import
- Your new contact group (label) will now show on the left navigation panel and the number of contacts within it will show also
- Your contacts will show in Google Contacts and your Moxi

Important Notes on Syncing Email Contacts to Moxi

- **If you use our GSuite emails (our @CBSchmidtOhio.com, @CBGreatLakes.com etc emails) This is For You:**
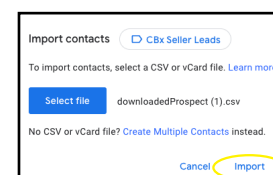Moxi automatically syncs with our GSuite emails (our @CBSchmidtOhio.com emails). Anyone added in that email's Contacts will sync and show in Moxi Engage. No action required. Moxi already mirrors your GSuite contacts. It is 1-way. Adding a contact in your GSuite contacts adds it to Moxi but if you remove a contact in Moxi, it does not remove it in your GSuite contacts. Please make sure sure your Moxi sync email is correct in Moxi My Account area.
- **If you use Gmail, but not our company GSuite email (Example ElizabethGlass@gmail.com) This is For You:**
You CAN use and sync your personal Gmail contacts to Moxi. You just need to change your Moxi sync email in Moxi My Account are if it is not already this email you want. To change your Moxi sync email, go to Support.Moxi Works.com and click Submit a Ticket on the top right. Fill out the request form for them asking them to 'Change my Moxi Sync Email' and provide your Gmail address there. They will change it and also email you to let you know it is done. Then, any contacts in that Gmail will show in Moxi the next time you log in.
- **If you use a non-Gmail email address (ex: Yahoo, AOL) This is For You:**
Moxi Sync will not work with non-Gmail emails. Our Regional Service Coordinator can help get you sign-in access your company GSuite to use for this. Then you can use the instructions on the previous page to import to your company GSuite to sync.
- **If you do not want to sync email contacts with Moxi This is For You:**
There is now a direct contacts import option in Moxi. This will not sync with anything else. Follow steps below.

Direct Contacts Upload to Moxi
## Directly Upload Contacts Within Moxi Engage without Syncing to Email Contacts

- For best upload results placing all client information correctly, use the upload csv spreadsheet provided by Moxi. Simply copy the columns from the whatever spreadsheet you have your contacts on and paste to the matching column on the Moxi upload spreadsheet. Save your new Moxi spreadsheet and move to step 2.
- **Click here** for the Moxi Direct upload csv template.

Moxi Direct Contacts Upload

- Log in to your Moxi Account at My.SchmidtResources.com
- Click Engage in the top navigation panel

- Click the Settings gear icon in the top right
- Click Import Contacts
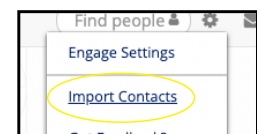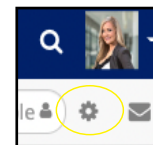
- Click Select File
- Go to the folder / location of your csv, select, and click Open
- Moxi will show a notification when the upload is complete
- Your contacts will then show in Moxi