

Creating Contact Groups and Importing Contacts or Leads

An ICTDialer CRM data-preparation guide

Purpose: Explain how to create a contact group and import contact or lead records that can be assigned to an ICTDialer campaign.

Intended audience: Administrators, campaign managers, and CRM users responsible for preparing calling lists.

Before You Begin

Contacts and leads contain the customer information used by campaigns, such as name, telephone number, and email address. Organizing records into groups makes it easier to select and prioritize the correct audience for a campaign.

- Prepare the contact data in CSV, ODS, or XLS format, or identify an existing group to copy.
- Use consistent column headings and telephone-number formatting.
- Confirm that every record has the data required by your campaign, especially a valid telephone number.
- Remove records that must not be contacted and follow applicable consent and do-not-call requirements.

1. Create a Contact Group

Navigation path: CRM > Customer > Contact Group > Add New

1. Open the ICTDialer navigation menu and select CRM.
2. Under Customer, select Contact Group.
3. Review the contact-group list. From this page, authorized users can view, edit, or delete groups and inspect their contacts.
4. Select Add New in the upper-right corner.
5. Enter the group details and select Save.

Field	Description
Title	Enter a clear group name that identifies the list, campaign, source, or target audience.
Description	Enter an optional description that explains the purpose or source of the group.
Group Type	Select the group type required by your deployment. For standard uploaded calling lists, use the applicable internal-contact option.

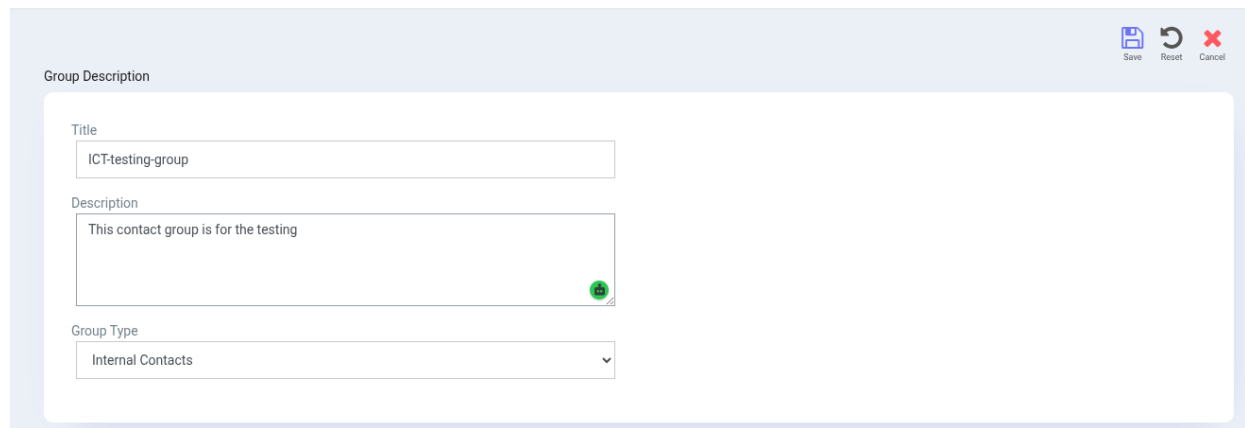


Figure 1. Contact Group form with title, description, and group type.

2. Import Contacts or Leads

Navigation path: CRM > Customer > Contacts > Import

1. Open CRM and, under Customer, select Contacts.
2. Select Import to open the Import Contacts page.
3. Choose the appropriate source type.
4. Select or upload the source file, or choose the existing group to copy.
5. Select the target group that will receive the imported records.
6. Review any additional import options displayed by the system.
7. Select Save to start the import.

Field	Description
Upload Contacts via Standard File	Import contacts from a supported spreadsheet file, such as ODS or XLS.
Upload Contacts via CSV File	Import contacts from a comma-separated values (CSV) file.
Copy Contacts from Existing Groups	Copy records from a group that already exists in ICTDialer.
Target Group	Select the contact group into which the records will be imported.

Import Contact From

Type of Source

Upload Contacts via standard file

Upload contact's File

Choose File contactttttt.csv

Example File

Contact_sample.csv

Import Contacts Into

Target Group

Collections - Access Loan Book- Bucket 2 JUNE 25TH(in)

Fetch CNAM Data ⓘ

Don't fetch

Figure 2. Import Contacts page showing source-file and target-group options.

3. Verify the Imported Data

1. Return to CRM > Customer > Contact Group.
2. Open the target group and confirm that the expected number of records is present.
3. Review several sample records to verify names, phone numbers, email addresses, and custom data.
4. Correct formatting or mapping issues before assigning the group to a live campaign.

Data quality: A clean contact list improves answer rates, reporting accuracy, and agent productivity. Duplicate, invalid, or incorrectly formatted numbers should be corrected before campaign launch.

Recommended Data-Preparation Practices

- Keep a backup of the original source file before importing.
- Use a separate group for each campaign, source, region, or priority level when practical.
- Use internationally consistent phone-number formatting when required by the SIP provider.
- Test a small sample campaign before launching a large contact list.