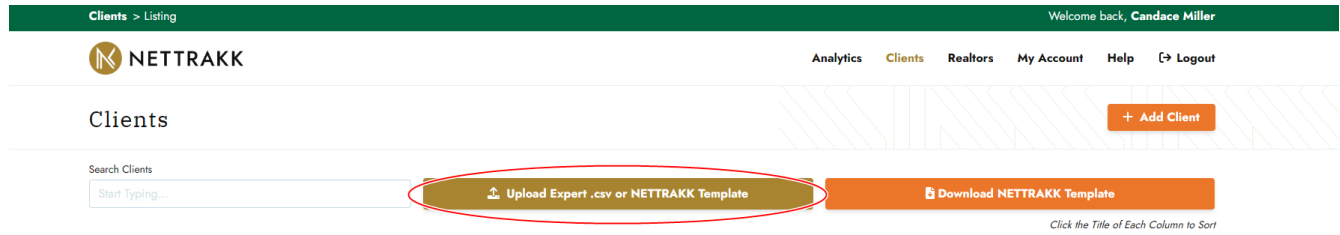
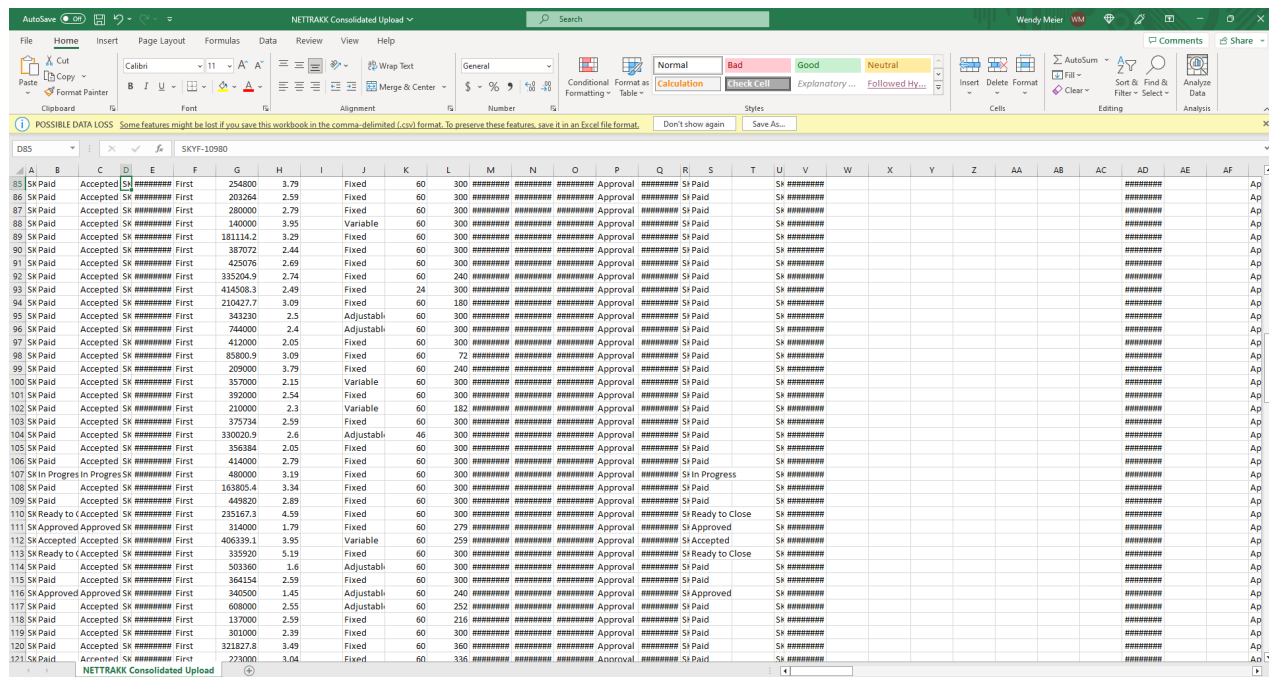


How to upload your csv client list from Filogex Expert

Log in to your NETTRAKK account, and click on the Clients tab to get to your Clients screen. Once you're there, it's a quick **one-step** process to upload your clients into your account.



1. Click on **Upload Expert .csv or NETTRAKK Template** to upload your Filogex .csv spreadsheet.



2. Search your computer for the .csv spreadsheet and click **Open** and you're done!
3. Your clients will receive a Welcome Email with instructions to accept this invitation and complete their account registration.

*Tips for creating your .csv spreadsheet:

1. Be sure to "uncheck" any clients that will not be going into NETTRAKK when you are completing "Extract to CRM" in the Tools section of Filogex.
2. Once you have downloaded your spreadsheet, review it to ensure the client list is correct and that you have all of the email addresses on the sheet. If there are email addresses missing, this is a great opportunity to reach out to your clients for that "extra touch" and tell them how excited you are to get them signed up with NETTRAKK.
3. Once you are satisfied that your client list is accurate and complete, select the **Upload** button.