

How to Import Contacts from Outlook into TrialWorks

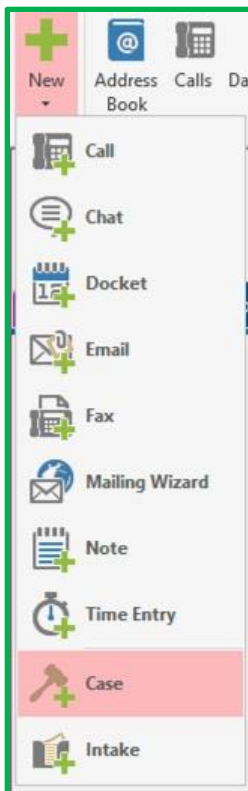
Version 11 and higher

Avoid re-entering data or creating duplicates by importing all of your existing Contact Records from Outlook into TrialWorks!

Create a “Contacts Only” Case

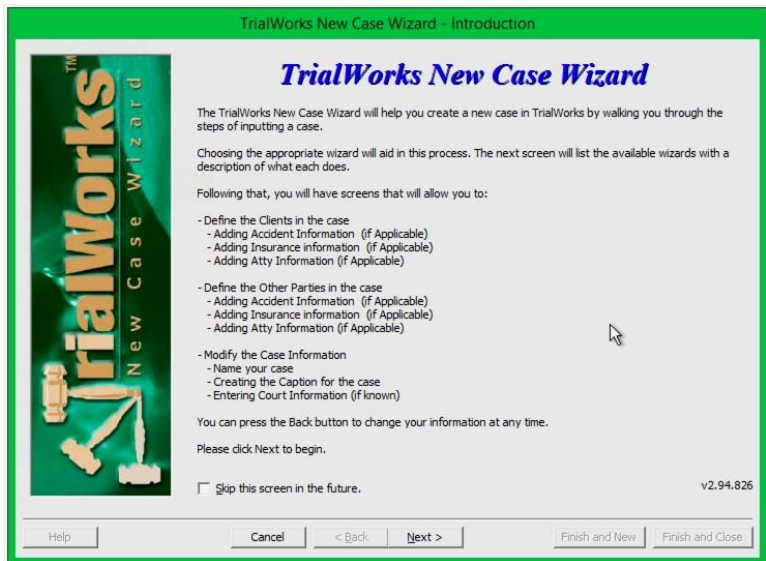
The first step in preparing to import your Contacts from Outlook into TrialWorks is to provide those contacts a place to reside. Every Contact record in TrialWorks must be associated with a particular case. Therefore, creating a “Contacts Only” case provides a *destination* for those incoming contact records.

So, let’s get started!



First, create your new case by going to **Home > New > New Case Wizard** to launch the New Case Wizard.

Then, create your new case!



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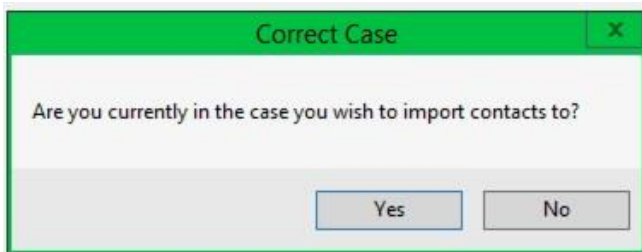
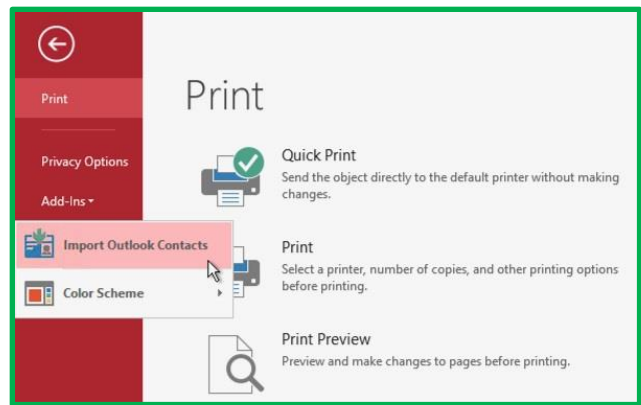
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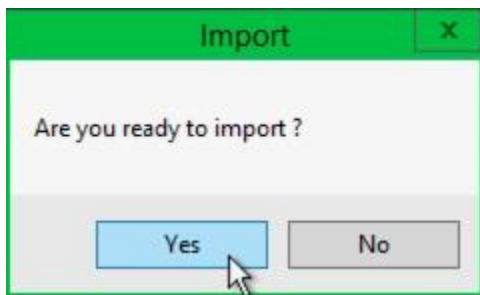
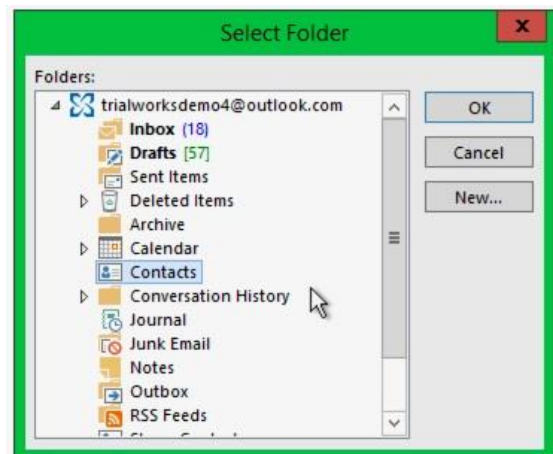


Next, once your case has been successfully created, go to **File > Add-ins > Import Outlook Contacts** to select the import process



Re-confirm that you are in the “Contacts Only” case you’ve just created in TrialWorks

Next, select the **Contacts** folder from which you are importing Contact Records



Click “Yes” if you’re ready to begin your import!

Note: Depending on the number of contact records, this process could take several minutes to complete.

If you’re interested in learning more about TrialWorks, please contact Training at (305) 357-6500.

