

## Import contacts from Batchbook source

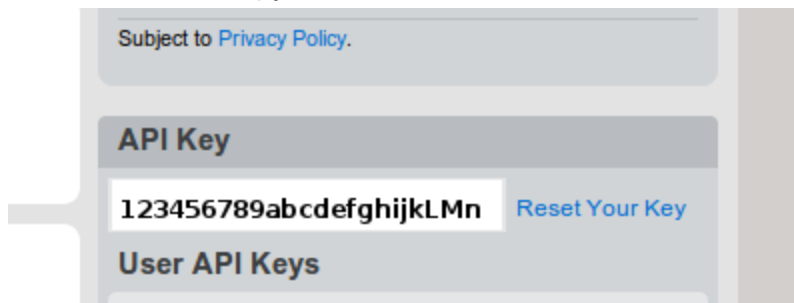
Open your Batchbook dashboard by going to: [https://\[your organization name\].batchbook.com](https://[your organization name].batchbook.com)

Click the link at the top-left corner of the page where it says  
“Hi, [your name]” and then select “Settings”

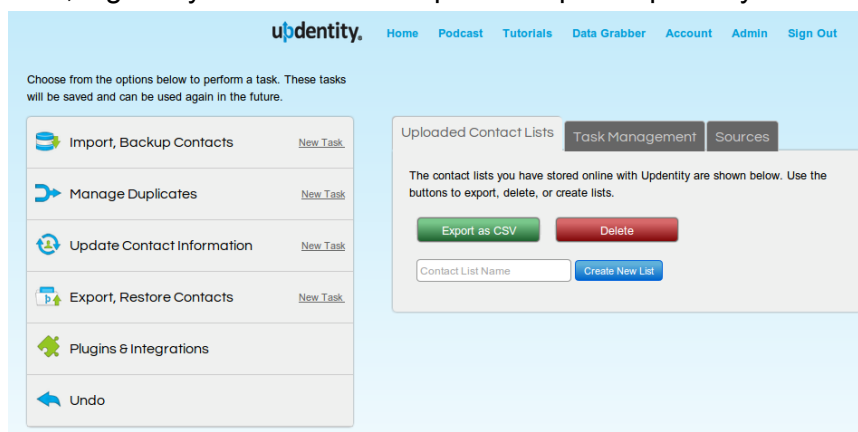


Make a note of your API key and organization name (your organization name is the first part of the website location of your Batchbook dashboard: **orgname.batchbook.com**)

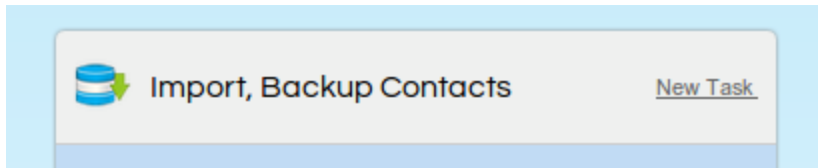
You will need to copy these in a moment



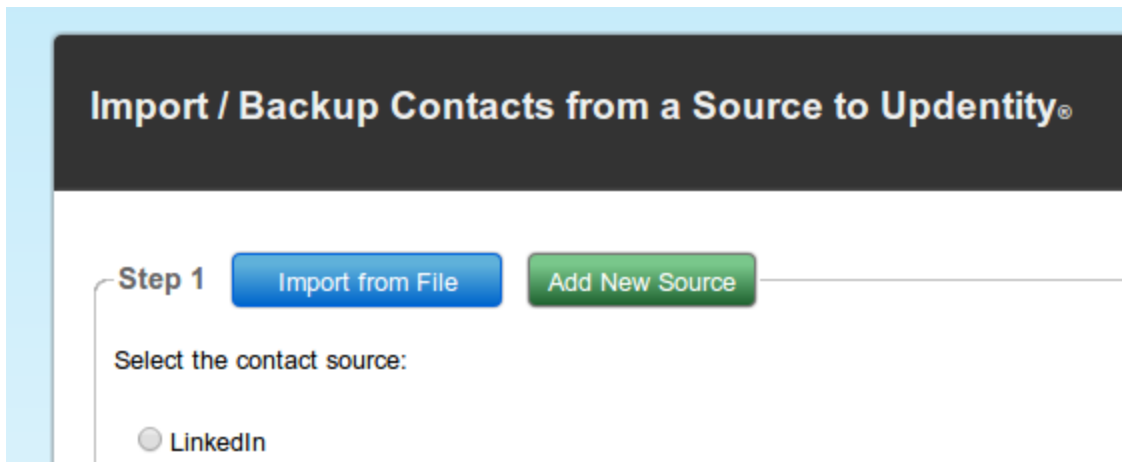
Next, login to your account at <https://enterprise.updentity.com>



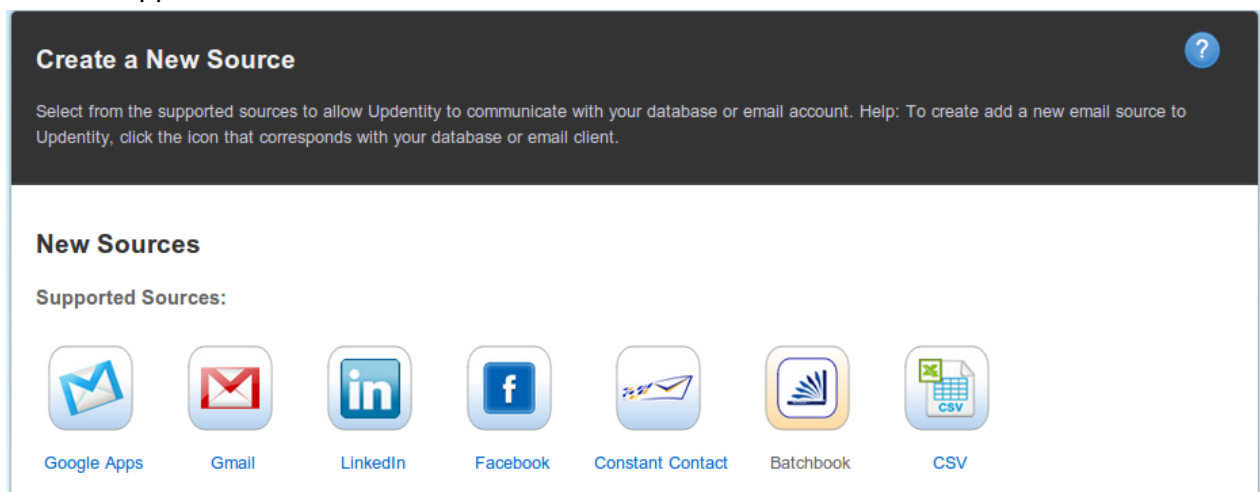
Click “Import, Backup Contacts” from the home page



Click the “Add New Source” button



Under “Supported Sources” click the “Batchbook” button



In the form that follows, enter your organization name from Batchbook ( see **orgname** above ) and your API key you saw on your Batchbook dashboard.  
Then, click “Continue”.

### Create a New Source

Enter your Batchbook organization name and API Key below. (?)

Step 1: Enter your Batchbook API information

Batchbook Organization Name:

API Key:

Continue

Cancel

Make up a name by which to call this source in Updentity. Default is “Batchbook Accounts”.  
Then click “Continue”

Step 2: Enter a name for this source

Name:

Continue

Back

Cancel

Your browser will automatically return you to the: “Import / Backup Contacts from a Source to Updentity”.

Step 1: Here, select the new Batchbook contact source you just added, “Batchbook Accounts” or the custom name you assigned to the source.

### Import / Backup Contacts from a Source to Updentity®

Step 1

Import from File

Add New Source

Select the contact source:

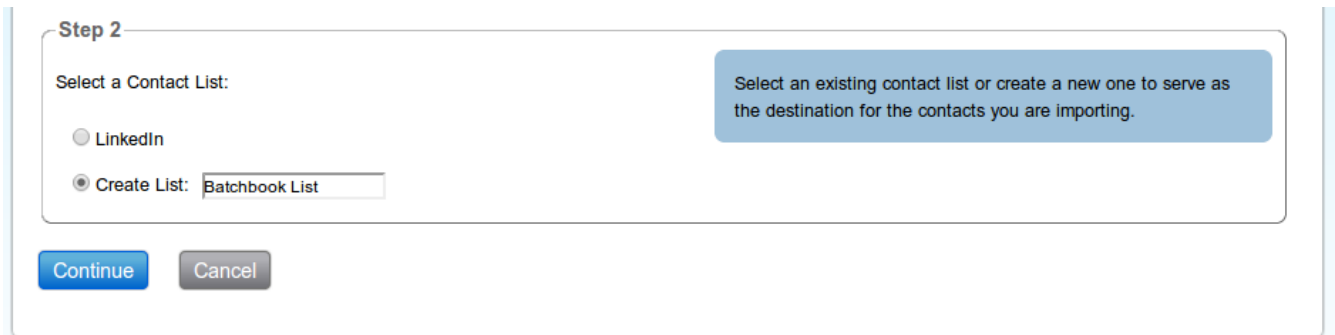
☐ Batchbook Accounts

☐ LinkedIn

Add a new source or import from a file by selecting one of the buttons above. Choose an email account or database as the source for the contacts to import or upload contacts from a .CSV file that has been exported from an email client or database.

Step 2: (on the same page)

You will need to create a new list into which your Batchbook accounts will be imported. Type any name you wish, but it's best if it describes the source (e.g. "Batchbook List").



**Step 2**

Select a Contact List:

☐ LinkedIn

☒ Create List:

Select an existing contact list or create a new one to serve as the destination for the contacts you are importing.

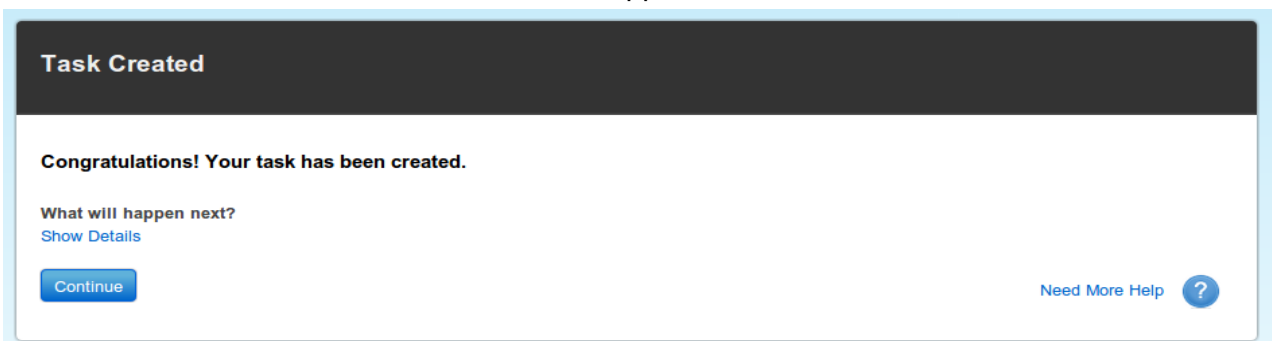
[Continue](#) [Cancel](#)

Click "Continue"

If everything goes according to plan, the new list has been created and your Batchbook contacts are being imported.

Your browser will be directed to this "Task Created" page.

Click the "show details" link under "What will happen next?" for additional information



**Task Created**

**Congratulations! Your task has been created.**

What will happen next?  
[Show Details](#)

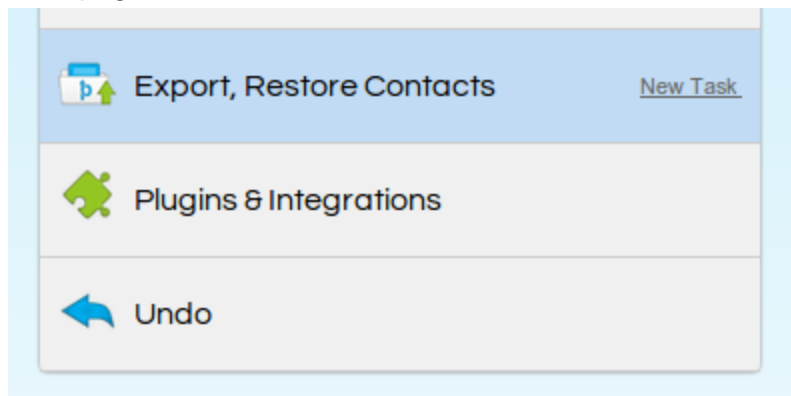
[Continue](#) [Need More Help ?](#)

You may now click "Continue" and be returned to the Updentity application home page.

## Push new and updated contacts back to Batchbook

Updentity has the ability to synchronise your Updentity contacts with your Batchbook account. If you have added data to your Updentity contacts, that data will be added to Batchbook. If you have deleted or changed data in Updentity, we currently will NOT delete or overwrite any data on your Batchbook account.

If you have received updates in Updentity, if you want to add an Updentity list to your Batchbook account, or if you've made manual changes to contacts in Updentity and want Batchbook to reflect those same changes, you need the "Export, Restore Contacts" function on the Updentity homepage.



The page "Export or Restore Contacts from Updentity to a Source" opens.

Step 1: Select the Updentity contact list that you want to synchronise with Batchbook

A screenshot of the 'Export or Restore Contacts from Updentity to a Source' page. The page has a dark grey header with the title 'Export or Restore Contacts from Updentity to a Source'. Below the header, there is a section titled 'Step 1' with the instruction 'Select the contact list that you would like to Export / Restore:'. There are two radio buttons: 'LinkedIn' and 'Batchbook List', with 'Batchbook List' being selected. To the right of the radio buttons, there is a blue box with the text: 'Select the contact list you would like to export to a database or email client. To export to a .CSV file, do so from the home page.'

Step 2: Select your Batchbook source. Then click "Continue".

A screenshot of the 'Export or Restore Contacts from Updentity to a Source' page, Step 2. The page has a dark grey header with the title 'Export or Restore Contacts from Updentity to a Source'. Below the header, there is a section titled 'Step 2' with a green button that says 'Add New Source'. Below this, there is the instruction 'Select the Export / Restore source:'. There is one radio button labeled 'Batchbook : Batchbook Accounts', which is selected.

The synchronisation process has begun. Your browser will be directed to the "Task Complete" page. Click "Continue" again to return to your Updentity homepage.