



BOLD TRAIL—CRM

ADDING CONTACTS INDIVIDUALLY AND BULK IMPORT

Adding Contacts Individually

1. Log in to your REMAX.NET. Under Apps Platform by BoldTrail.
2. Navigate to the **Contacts** tab on the left hand side.
3. Use the search bar at the top and select **"Add Contact"** to trigger the entry form help.insiderealestate.com.
4. Complete the fields (e.g., name, email, phone, address, tags).
5. Save the contact.
6. Optional: Assign to campaigns or tag for later follow-up.

Bulk Importing Contacts

1. Log in to your **REMAX.NET**. Under Apps **Platform by BoldTrail**. Click **MORE** on the left side. Click **LEAD ENGINE**. Click **BULK IMPORT** square.
2. Initiate the **Bulk Import** workflow (often via "Import Contacts" or similar).
3. Click **Let Us Handle It. Walk through steps.**
4. Prepare your import file (e.g., CSV).
5. Upload the file to the system.
6. Make sure under TAGS you put info you may want for categories. EX: MLS IMPORT 2025

7. It may take a couple of days for the import. After import the contact number may be higher then a few days drops number of contacts. This is due to going through duplicates.

IF YOU NEED ADDITIONAL HELP PLEASE REACH OUT TO KAREN OR GINA.