CSV Upload Pre-requisites

Whether this is your first CRM or you're moving from another system, importing helps you create records and update your database.

Each row represents a *contact record*, and each column of information represents a *contact property* (First Name, Last Name, Email Address etc)

Import requirements

File requirements

All files being imported into the system must:

- Be a .csv file
- Have only one sheet
- Be smaller than 50MB (*tip: a typical .csv file with 4 columns and 10,000 records will be ~500kb in size*)
- Include a header row in which atleast one column header corresponds to a field in the system
    - For Uploading ONLY New Records in the system
        - Choose 'Add New Records' in Step 3 of the Import Flow
    - For Updating ONLY Existing Records in the system
        - Choose 'Update Contact Records' in Step 3 of the Import Flow
    - For Both
        - Choose 'Both' in Step 3 of the Import Flow

Note: While the default unique identifier is to Email, our system allows you to choose fields other than Email for de-duplication purposes during the Bulk CSV Upload

Column Values Format requirements

Depending on the records you are importing, your file could include the following columns:

- **Date Picker**
    - Acceptable formats-
        - mm/dd/yyyy (e.g. 10/28/2020)

- yyyy/mm/dd (e.g. 2020/10/28)
- <mark>You can also replace '/' with '-' '.' and it'll recognise the uploaded fields as a Date field (Available in our future release!)</mark>

- **Multiple Options, Checkbox, Textbox List**
  - Acceptable formats-
    - Value 1, Value 2, Value 3 ...... (e.g. Blue,Yellow,Green or Blue, Yellow, Green or Blue , Yellow , Green)
    - You can also replace ' , ' with ' ; ' ' . ' and it'll recognise the uploaded fields as the aforementioned field

- **Radio, Single Option**
  - Acceptable formats-
    - Value 1 (e.g. Blue)

- **File Upload, Signature**
  - Not Supported

- **Contact Owner**
  - To assign an owner to your contacts during the import, include the name of the 'User'
  - Acceptable formats-
    - FirstName LastName (e.g. Logan Paul or logan paul)
    - LastName FirstName (e.g. Paul Logan or paul logan)
    - **Note #1**: Unless the user has both FirstName and Last Name, the system will not recognise it during upload

- **Tags**
  - Acceptable formats-
    - Value 1, Value 2, Value 3 ...... (e.g. Blue,Yellow,Green or Blue, Yellow, Green or Blue , Yellow , Green)
    - You can also replace ' , ' with ' ; ' ' . ' and it'll recognise the uploaded fields as the aforementioned field

Tags (example formats)	Status
lowercase	ok
UPPERCASE	ok (will be lowercased)
ProperCase	ok (will be lowercased)
with a space	ok
With A Space	ok (will be lowercased)
pre-existing tag	ok (maps successfully)

- **DoNotDisturb**
    - Acceptable formats-
        - True or False (true or false)
        - Yes or No (yes or no)

- **Phone Number**
    - For the vast majority of cases, as long as you format the phone numbers in E.164 (Ex: +1 1234567890) our system will recognise it as valid- irrespective of the default Country picked at the sub-account level
    - Additionally, if you have set the Country to the the US, the following would work perfectly fine as well
        - 123-456-7890
        - (123) 4567890
        - 1234567890
    - Furthermore, if you are working with international numbers (Outside US), we'd encourage you to visit : https://libphonenumber.appspot.com/ and run your phone number format by the tool in conjunction with the codes below to ascertain it's appropriateness for upload.

- **Numerical**
    - Acceptable formats-
        - 1.23.4
        - 1234
        - .123

- **Monetary**
  - Acceptable formats-
    - 1234
    - 1,234,234,333