**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*

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*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)

You can also replace '/' with '-' '.' and it'll recognise the uploaded fields as a Date

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field (Available in our future release!)

• **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)

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• **Tags**

**Note #1**: Unless the user has both FirstName and Last Name, the system will not recognise it during upload

• 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

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(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

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perfectly fine as well

• 123-456-7890

• (123) 4567890

• 1234567890

Furthermore, if you are working with international numbers (Outside US), we'd

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encourage you to visit : and run your phone

https://libphonenumber.appspot.com/

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