

Importing Contact Records

Preparing Your CSV File for Import

- You will find the field mapping portion of the import easier if you rename the column headers to match the field names in ontrack.

For example:

	A	B	C	D	E
1	Name	First name	Last name	Phone	Email
2	full m. name	Full M.	Name	999-999-9999	example@example.com

- Most people find it useful to add a column **Lead Source**. The value must match exactly to one of the selections in the field Lead Source in onTrackCRM on the Contact Detail screen. **For example: Other** is a common Lead Source used for import.
- **Secondary Source** is also useful to specify where the imported leads came from. Secondary Source is plain text, so you can enter any value you desire.
- Each record to be imported must have a Last Name column or it will be excluded
- Use the formula in the next section to split first and last name if needed

Importing Your CSV File

- In onTrackCRM, navigate to **Sales > Contacts**
- Click the **Import Icon**



- Click **Browse** and select the CSV file you previously prepared
- Under the **Mapping** column, select the field in onTrackCRM that the data contained in each column of the CSV file will be placed into. It is not required to import every column.

Step 2 of 4 : Contacts List & Mapping

The following tables shows the imported Contacts and other details. To map the fields, select t

Use Saved Mapping : --Select-- ▼

Mapping	Headers :
-- Do not map this field -- ▼	Name
First Name ▼	First name
Last Name * ▼	Last name
Mobile ▼	Phone
Email ▼	Email
Lead Source ▼	Lead Source
Secondary Source ▼	Secondary Source

- Click **Import Now**
- After the import has processed a confirmation screen will appear showing the number of successful and skipped records. Click **Finished**.

Step 4 of 4 : Mapping Results

Success!

No. of Records Successfully Imported : 175

No. of Records Skipped as they were missing one or more required fields : 0

Finished

Useful Excel Functions

It is common when we export data from an application that the entire name is combined in one field. This can result in a considerable amount of manual work to separate the name into First Name and Last Name columns. Below are simple Excel formulas to automate the name split and to change the names to Proper Case (1st letter of name is capitalized). Middle initials are only detected if they are followed by a period(.).

- In Excel, insert 2 new columns for First Name & Last Name to the right of the column that contains the Full Name
- Insert this formula into the First Name column

```
=PROPER ( IF ( ISERROR ( FIND ( "." , A2 , 1 ) ) , LEFT ( A2 , FIND ( "." , A2 , 1 ) - 1 ) , LEFT ( A2 , FIND ( "." , A2 , 1 ) ) ) )
```

- Insert this formula into the Last Name column

```
=PROPER ( IF ( ISERROR ( FIND ( "." , A2 , 1 ) ) , RIGHT ( A2 , LEN ( A2 ) - FIND ( "." , A2 , 1 ) ) , RIGHT ( A2 , LEN ( A2 ) - FIND ( "." , A2 , 1 ) - 1 ) ) )
```

NOTE: The above formulas assume that there is a column header row as pictured and that your data starts on the 2nd row.

	A	B	C	D	E
1	Name	First name	Last name	Phone	Email
2	full m. name	Full M.	Name	999-999-9999	example@example.com