

Contacts are imported using a CSV (Comma Separated Values) file format. Most websites and databases will allow you to export your existing records in CSV format.

Prepare the CSV File

- Open a Contact Record in onTrackCRM ([Sales > Contacts](#) > Click on any contact in the list)
- Using the name of the data field in onTrackCRM, replace the column header in the CSV file. This will make it easier to match fields during the import process. Here are some examples;
 - First Name: Type this in the column header that you want imported into the First Name field in onTrackCRM
 - Last Name: **This field is required. Any rows with a black last name will not be imported**
 - Office Phone:
 - Mobile:
 - Mailing Street:
 - etc.
- Save the CSV file

Import into onTrackCRM

- In onTrackCRM, click [Sales > Contacts](#)
- Click the import icon
- Select the CSV file to be imported
- Map the column in your CSV file to the desired onTrackCRM data field
- Click Import

Advanced Data Prep

Separate First & Last Name in Excel

- This assumes the Full Name is in B2
- Formula for First Name: =IFERROR(LEFT(B2,FIND(" ",B2)),B2)
- Formula for Last Name: =IFERROR(RIGHT(B2,LEN(B2)-FIND(" ",B2)),B2)