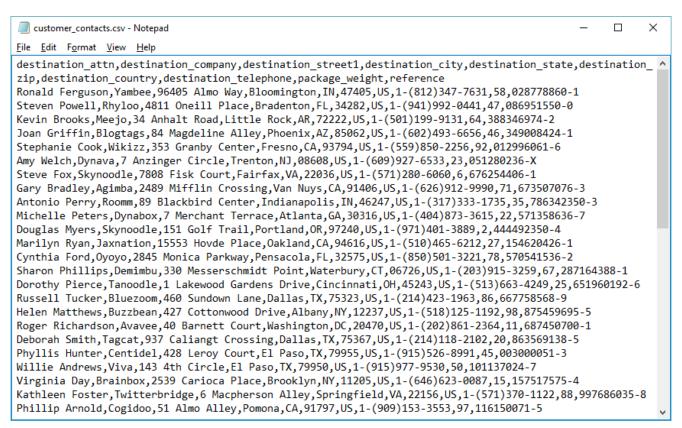# Basic Contact Importing

The system is able to import contacts into customer address books from a variety of formats. This tutorial will take you through the process of importing a basic CSV file containing contacts which applies to most cases.

Examine your File

Open the file you have in Notepad or a text editor to check that it looks similar to the illustration. A **CSV** file is a "Comma Separated Value" file where each line contains one contact and each field is separated by a comma and always in the same order. Often there is a header line at the start. This is the type of file that can be easily exported from Excel. Sometimes you will see quotes around each value and that is fine too.

Typical CSV format text

You will need the following columns in the file for basic importing:

- A column for the country code. This is the [ISO-3166](#) code for each country ("CA" for Canada, "US" for the United States, "GB" for the United

Kingdom, etc).

- A column for the province or state code (at least for Canadian and American addresses). For example, "QC" for Quebec, "NY" for New York, etc.
- A column for the city
- A column for the Postal Code or ZIP code (for countries where this is used)
- A single column for the contact name. If you have separate columns for First and Last names that's OK as long as they are in that order. You can use Excel to reverse them if necessary.
- A single column for the company name.
- A single column for each line of the street address.

If your file contains more than **500 contacts**, you should use Excel to split the file into parts so that each file contains fewer. The number of contacts you can import at once is determined by your browser and computer specifications so you can experiment.

Create an Address Book

You will need to be impersonating your customer so that when you click on **Home | Address Books** you see their address books and not your own. (Otherwise you'll import the contacts into your own account.)

Click New Address Book to create the new book for imports

You should create a new address book for the import in case you need to repeat the process. This way you can delete the entire address book in one step.

In **Home | Address Books** click **New Address Book** and label it appropriately.

Select a suitable name and description

Importing the Contacts

Then in **Home | Address Books** click **Import Contacts** to begin.

Click Import Contacts to begin

The next page will ask you to select the target address book and select the format. In this tutorial we will be using the "Customer CSV" format which will suit most cases. Only use one of the other formats if you know your file is in exactly that format.

Choose your target address book and select Custom CSV

Upload the file and click **Submit** to proceed.

You will now see a table containing all the entries in this file. If the file is large, this may take some time. Remember to split large files into 500 to 1000 contacts at a time.

	destination_attn	destination_company	destination_street1	destination_city	destination_state	destination_zip	destination_country	d
✔	Ronald Ferguson	Yambee	96405 Almo Way	Bloomington	IN	47405	US	1
✔	Steven Powell	Rhyloo	4811 Oneill Place	Bradenton	FL	34282	US	1
✔	Kevin Brooks	Meejo	34 Anhalt Road	Little Rock	AR	72222	US	1
✔	Joan Griffin	Blogtags	84 Magdeline Alley	Phoenix	AZ	85062	US	1
✔	Stephanie Cook	Wikizz	353 Granby Center	Fresno	CA	93794	US	1
✔	Amy Welch	Dynava	7 Anzinger Circle	Trenton	NJ	08608	US	1
✔	Steve Fox	Skynoodle	7808 Fisk Court	Fairfax	VA	22036	US	1
✔	Gary Bradley	Agimba	2489 Mifflin Crossing	Van Nuys	CA	91406	US	1
✔	Antonio Perry	Roomm	89 Blackbird Center	Indianapolis	IN	46247	US	1
✔	Michelle Peters	Dynabox	7 Merchant Terrace	Atlanta	GA	30316	US	1
✔	Douglas Myers	Skynoodle	151 Golf Trail	Portland	OR	97240	US	1
✔	Marilyn Ryan	Jaxnation	15553 Hovde Place	Oakland	CA	94616	US	1
✔	Cynthia Ford	Oyoyo	2845 Monica Parkway	Pensacola	FL	32575	US	1
✔	Sharon Phillips	Demimbu	330 Messerschmidt Point	Waterbury	CT	06726	US	1
✔	Dorothy Pierce	Tanoodle	1 Lakewood Gardens Drive	Cincinnati	OH	45243	US	1
✔	Russell Tucker	Bluezoom	460 Sundown Lane	Dallas	TX	75323	US	1

Import Selection   Parse Selected Addresses

The initial screen showing the contact import data

In this page you will need to assign a label to each column of data you wish to

import. You do this by scrolling to the column and clicking the drop-down at the top then selecting the appropriate field.

Make sure you use Country Code and Province Code

*Important Columns: Always select **Country Code** for the two character country code column. You don't need to use the "Country" column. Always select **Province Code** for the two character province or state column. You don't need to use the "Province" column.*

Un-check any lines you don't want to import such as the header.

Make sure you have assigned all the useful columns

If you need to adjust specific data you can click on the cell to edit it.

Click a cell to start editing it

When you are happy with the data, click **Import Selection** to begin. As each contact is imported the checkbox will be removed.

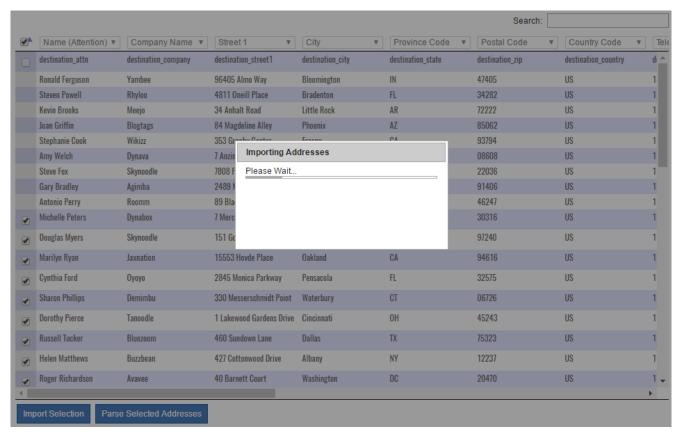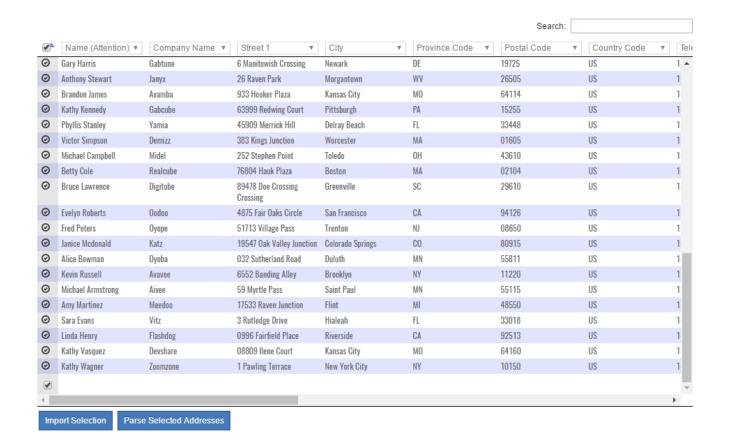|	Name (Attention) ▼	Company Name ▼	Street 1 ▼	City ▼	Province Code ▼	Postal Code ▼	Country Code ▼	Tele
☐	destination_attn	destination_company	destination_street1	destination_city	destination_state	destination_zip	destination_country	d
	Ronald Ferguson	Yambee	96405 Almo Way	Bloomington	IN	47405	US	1
	Steven Powell	Rhyloo	4811 Oneill Place	Bradenton	FL	34282	US	1
	Kevin Brooks	Meejo	34 Anhalt Road	Little Rock	AR	72222	US	1
	Joan Griffin	Blogtags	84 Magdeline Alley	Phoenix	AZ	85062	US	1
	Stephanie Cook	Wikizz	353 Granby Center	Fresno	CA	93794	US	1
	Amy Welch	Dynava	7 Anzin			08608	US	1
	Steve Fox	Skynoodle	7808 F			22036	US	1
	Gary Bradley	Agimba	2489 N			91406	US	1
	Antonio Perry	Roomm	89 Bla			46247	US	1
☑	Michelle Peters	Dynabox	7 Merc			30316	US	1
☑	Douglas Myers	Skynoodle	151 Go			97240	US	1
☑	Marilyn Ryan	Jaxnation	15553 Hovde Place	Oakland	CA	94616	US	1
☑	Cynthia Ford	Oyoyo	2845 Monica Parkway	Pensacola	FL	32575	US	1
☑	Sharon Phillips	Demimbu	330 Messerschmidt Point	Waterbury	CT	06726	US	1
☑	Dorothy Pierce	Tanoodle	1 Lakewood Gardens Drive	Cincinnati	OH	45243	US	1
☑	Russell Tucker	Bluezoom	460 Sundown Lane	Dallas	TX	75323	US	1
☑	Helen Matthews	Buzzbean	427 Cottonwood Drive	Albany	NY	12237	US	1
☑	Roger Richardson	Avavee	40 Barnett Court	Washington	DC	20470	US	1

Importing Addresses

Please Wait...

Import Selection   Parse Selected Addresses

Contacts are now being imported

You should now see the completed import list with ticks showing successful imports.

	Name (Attention) ▼	Company Name ▼	Street 1 ▼	City ▼	Province Code ▼	Postal Code ▼	Country Code ▼	Tele
⊘	Gary Harris	Gabtune	6 Manitowish Crossing	Newark	DE	19725	US	1
⊘	Anthony Stewart	Janyx	26 Raven Park	Morgantown	WV	26505	US	1
⊘	Brandon James	Avamba	933 Hooker Plaza	Kansas City	MO	64114	US	1
⊘	Kathy Kennedy	Gabcube	63999 Redwing Court	Pittsburgh	PA	15255	US	1
⊘	Phyllis Stanley	Yamia	45909 Merrick Hill	Delray Beach	FL	33448	US	1
⊘	Victor Simpson	Demizz	383 Kings Junction	Worcester	MA	01605	US	1
⊘	Michael Campbell	Midel	252 Stephen Point	Toledo	OH	43610	US	1
⊘	Betty Cole	Realcube	76804 Hauk Plaza	Boston	MA	02104	US	1
⊘	Bruce Lawrence	Digitube	89478 Doe Crossing Crossing	Greenville	SC	29610	US	1
⊘	Evelyn Roberts	Oodoo	4875 Fair Oaks Circle	San Francisco	CA	94126	US	1
⊘	Fred Peters	Oyope	51713 Village Pass	Trenton	NJ	08650	US	1
⊘	Janice Mcdonald	Katz	19547 Oak Valley Junction	Colorado Springs	CO	80915	US	1
⊘	Alice Bowman	Oyoba	032 Sutherland Road	Duluth	MN	55811	US	1
⊘	Kevin Russell	Avavee	6552 Banding Alley	Brooklyn	NY	11220	US	1
⊘	Michael Armstrong	Aivee	59 Myrtle Pass	Saint Paul	MN	55115	US	1
⊘	Amy Martinez	Meedoo	17533 Raven Junction	Flint	MI	48550	US	1
⊘	Sara Evans	Vitz	3 Rutledge Drive	Hialeah	FL	33018	US	1
⊘	Linda Henry	Flashdog	0996 Fairfield Place	Riverside	CA	92513	US	1
⊘	Kathy Vasquez	Devshare	08809 Ilene Court	Kansas City	MO	64160	US	1
⊘	Kathy Wagner	Zoomzone	1 Pawling Terrace	New York City	NY	10150	US	1

Import Selection   Parse Selected Addresses

Check that all the contacts you want were successfully imported by looking for the tick on the left

When the job is done you can click on another menu link to leave.