Getting Your CSV List Ready to Import

Use this checklist and the video provided [here](#) to prepare your contact list for ONTRAPORT. The following instructions are for Microsoft Excel - if you use other software, simply adapt the instructions to suit your needs. You'll be one step closer to growing and scaling your business online!

- ☐ **EXPORT OR SAVE YOUR CONTACT LIST AS A .CSV FILE SO YOU CAN PREPARE FOR IMPORTING INTO ONTRAPORT.**

- ☐ **CLEAN YOUR LIST; IT'S PROBABLY ABOUT TIME ANYWAY!**
    - ☐ Do not double click the CSV file to open it in Excel, as Excel may strip leading zeros off postal codes, change longer phone numbers to scientific notation, etc. Instead, open Excel first, click the Data tab and select "From Text" in the "Get External Data" section. Select your downloaded CSV file to import it into Excel.
    - ☐ The Text Import wizard opens; select "Delimited" in step 1 then choose the comma character only in step 2. In step 3, select all columns and set the column type to "Text" and click "Finish". This preserves the formatting of zip or postal codes, phone numbers, etc.
    - ☐ Remove columns of data that aren't essential.
        - Hint: Each column that you import will become a custom field, or the cell values will become Contact Tags, depending on your selections within ONTRAPORT. To make the best use of your account, be sure you're only importing data that you really intend to use.

- ☐ **CREATE SEPARATE COLUMNS FOR FIRST NAMES AND LAST NAMES.**
    - ☐ Create 3-4 new columns to the right of the name column
        - Highlight column to the right of names → right click → **Add Column** (repeat as necessary)
    - ☐ Split first and last names into two columns.
        - Highlight name column → select **Data** menu → select **Text to Columns** → choose **Delimited** → click **Next** button → check the box labeled **Space**

(because the first and last names are separated by a space) → select **Next** → select **Finish**.

- Hint: If you get a message asking "Do you want to replace the contents of the destination cells?" then select **No**. You are receiving this message because you don't have enough blank columns to the right of your name column to accommodate the number of separate words in at least one of the name cells.
- For example, you may have a cell that reads: Dr. Chris Francis Van Geesen (five separate words).
- You can add more blank columns to accommodate all five of these separate words and then clean your list manually, or you can try to spot check it before trying again.

☐ Manually Complete your Name Split.

- Now complete the split by correcting the data that spans all 3-4 columns. To do this, consolidate the information into the First and Last Name columns.
  - Example: Chris (in first name column) Van Geesen (in last name column).
- You can also add a Title or a Middle Name column if you really think this information is necessary, but you may just want to take it out (as shown in the example).

☐ **IDENTIFY SEPARATE TAGS IN ONE COLUMN FOR IMPORT.**

☐ Scan your list for separate pieces of identifying information contained in one column that you would like to use as tags within ONTRAPORT.

- Example: In column D, labeled "Events Attended," each event that contact has attended may be separated by a comma and space, so that cell D5 reads: New Years Party, Spring Fundraiser 2012, Benefit Auction 2009. You must identify that each of these events should become separate tags within ONTRAPORT.

☐ Separate these pieces of information with these symbols: */*

- Highlight Column → key **Ctrl F** (or **command F** for Mac Users) to access the **Find and Replace** function → In the Find What box type **a comma and space** (not the words) and in the Replace With box type the symbols: */* → select **Replace ALL**.
- There should not be any spaces or commas between the tags, only the symbols.

☐ Manually clean up the column.

☐ Delete any */*s at the end of the cell that aren't separating information.

☐ Look for any spaces between the data and the symbols that shouldn't be there. Delete these spaces.

☐ Import your List!