

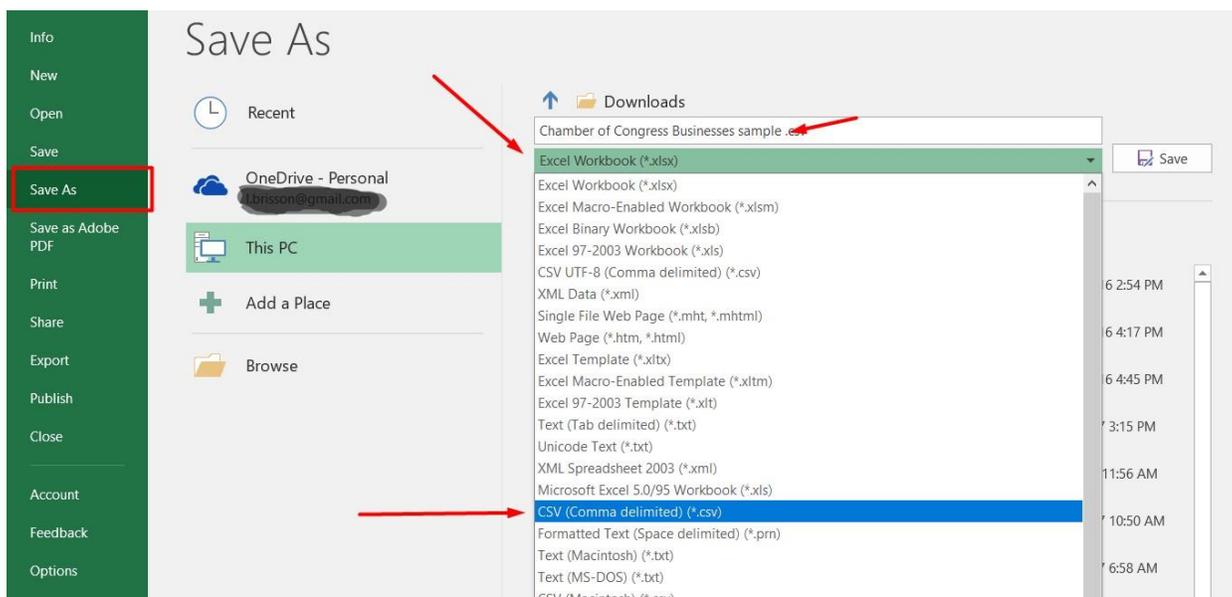
What is a CSV and how do I import it?

A CSV is a **comma separated values** file which allows data to be saved in a table structured format. CSVs look like normal spreadsheet but with a **.csv extension**. Traditionally they take the form of a text file containing information separated by commas, hence the name.

CSV files can be used with any spreadsheet program, such as Microsoft Excel, Open Office Calc, or Google Spreadsheets. They differ from other spreadsheet file types in that you can only have a single sheet in a file, they cannot save cell, column, or row styling, and cannot save formulas.

Your file will need certain formatting in order to be imported into PhoneBurner correctly.

1. To change the format of an Excel spreadsheet to CSV you will need to use the **"save as"** option and save as **CSV (Comma Delimited)**



2. Once you have the data in a CSV, you will want to check the file to make sure it is clean and that the information will go into PhoneBurner easily. Cleaning up data before uploading can save a lot of time and hassle of locating/deleting and re-uploading if there are errors.

Here is an example of a CSV with some bad data that should be cleaned up before import.

Company	Address	City	Email	Phone	Number of employees	years in busine	owner name
Budget Rent a Car	4502 Roswell Street NE	Sandy Springs, GA 30328	tinanda_lestyowati@telkomsel.net	6415330000	26	36	Jacoby Woodward
Kauffman Tire	3 Glenlake Parkway NE / 400	Atlanta, GA 30342	asst_dos@astonrasuna.com	6417424244	44	27	Brodie Avila
AAA Auto Club	4410 Roswell Street NE	Atlanta, GA 30342	martabali@dps.centrin.net	6418433372	40	50	Paloma Grant
Classic Cadillac	7700 Roswell Street	Atlanta, GA 30350	chatv@cbn.net	7703242100	63	46	Harrison Herman
Take 5 Oil Change LLC	4543 Rioswell Street	Atlanta, GA 30328	lali@tuguhotels.com	6412572255	13	15	Steve Lang
Mr. Transmission	4542 Roswell Street NE Suite C	Sandy Springs, GA 30328	balminimalist@yahoo.com	6418433372	29	18	Malik Savage
City Wine & Spiritsim	5841 Roswell Street	Sandy Springs, GA 30328	liss@thebale.com	6412284240	6	46	Kristian Cooley
Atlantic Limousine & Transp	2450 Plessantdale Rd	Atlanta, GA 30340	dhidharma@denpasar.wasantara.net	7707517078	12	25	Danna Lowe
Mercedes-Benz USA, LLC	303 Perimeter Center North Suite 202	Sandy Springs, GA 30344	centralreservation@ramayanahotel.com	7707053243	44	43	Karlee Cantu
Mikael's Auto Spa	4380 Roswell Street	Atlanta, GA	pribadi@balimandira.com	6412520374	49	29	Jade Kirby
Nalley Ford Sandy Springs	7555 Roswell Rd.	Atlanta, GA	dagenhart@ifc.org	7704470700	54	46	Tyshawn Morrison
Newell Brands	3 Glenlake Parkway	Atlanta, GA	ana_supriyanto@interconti.com	7704187557	53	47	Edwin Blanchard
Elizabeth Ammons, MD, FAC	3200 Cobb Galleria Pkwy Ste 205		os@novotelball.com	478-800-3223	57	44	Skyler Norman
Artisan Plastic Surgery	5470 Peachtree-Dunwoody Rd NE		daniel@hotelpadma.com	6418511228	53	26	Journey Bradshaw
Institute for Facial Aesthetic	5730 Glenridge Dr		daniel@balibless.com	6412545428	23	21	Aleah Sawyer
Sono Bello Body Contouring	1150 Hammond Dr, Bldg E		djoko_p@jayakartahotelsresorts.com	(478) 454-3025	14	29	Hugo Fletcher
Oculus Skin Care	5505 Peachtree Dunwoody Rd		expdepot@indosat.net	6418433434	53	48	Michael Parks
jenny Feil, DDS	107 W Paces Ferry Rd NW		feby.adamsyah@idn.xerox.com	6412234488	28	43	Anabel Burgess
Atlanta Ent Sinus & Allergy A	5555 Peachtree Dunwoody Rd		christian_rizal@interconti.com	6412552218	74	26	Siena Olsen
Bosley - Hair Restoration	3372 Peachtree Rd NE		singjih93@mailcity.com	8002784247	30	32	Jayda Bowen
Slim Studio CoolSculpting	4484 Roswell Rd NE, #A2		idonk_gebhoy@yahoo.com	6414107777	5	41	Michelle Tucker
Hair Restoration Specialists	6415 Roswell Rd		info@houseofballi.com	6412313100	44	17	Valentin Torres
The Lake Laser Hair Remova	2430 Herodian Way SE	Smyrna, GA	kyohana@toureast.net	7708742244	60	48	Roderick Tanner
Aesthetic & Implant Dentistr	200 Galleria Pkwy SE, Ste 1830		sales@nusaduahotel.com	(770) 255-0550	36	39	Haylee Stanley
Dental Spa	1875 Old Alabama Rd -	Roswell, GA	jayakarta@mataram.wasantara.net	(770) 228-3838	2	23	Sarahi Cruz
Smith Family Dental Care &	4720 Lower Roswell Rd	Marietta, GA	mapindo@indo.net	7702738222	14	24	Jamie Simpson
Aesthetic Dento- Facial Assc	7000 Peachtree Dunwoody Rd Bldg 2	Sandy Springs, GA 30328	sm@ramayanahotel.com	(770) 828-0000	25	22	London Sharp
Dermatology Assoc of Atlant	5555 Peachtree Dunwoody Rd Suite 120		anekabeach@dps.centrin.net	6412544457	42	30	Karli Small

Item #1 Shows the header row. This is important because it makes it easier to import the data into the system . The image below shows what happens when you have no header rows. #2 is the data you are importing from that column.

Contacts To Import

There are **75** records in this file. If the first record is a column header, then it will not be counted in

Tell us how to import the data

For each column in your spreadsheet, select the type of data that it represents.

- You may choose more than one row for each phone type. For instance, you can have more than one Phone (Work) per contact.
- Custom fields: you can add custom fields to your account during an import. These fields will show up for all contacts in your contact manager.

This is data from the first line of your file	How do you want it imported?
Budget Rent a Car	Don't Import
4502 Roswell Street NE	Don't Import
Sandy Springs,GA 30328	Don't Import
trinanda_lestyowati@telkomsel.net	Don't Import
6415303000	Don't Import
26	Don't Import
36	Don't Import
Jacoby Woodward	Don't Import

Check this box when the information you see above is an actual contact. Leave this box unchecked if the first row is column headers.

It is easy to recognize some of the data and if your file is very basic this is ok, but if you are new to imports and have lots of data, you will want to make sure you have headers.

Contacts To Import

There are **75** records in this file. If the first record is a column header, then it will not be c

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This is data from the first line of your file	How do you want it imported?
Budget Rent a Car	Don't Import
4502 Roswell Street NE	City
Sandy Springs,GA 30328	State
trinanda_lestyowati@telkomsel.net	Zip Code
6415303000	Notes
26	IP Address
36	Country
Jacoby Woodward	PhoneBurner® Status
	Company Name

26	Don't Import
36	City
	State
	Zip Code
	Notes
	IP Address
	Country
	PhoneBurner® Status
	Company Name
	Website
	Product
	DOB
	New Custom Field

Check this box when the information you see above is an actual contact. Leave this box unchecked if the first row is column headers.

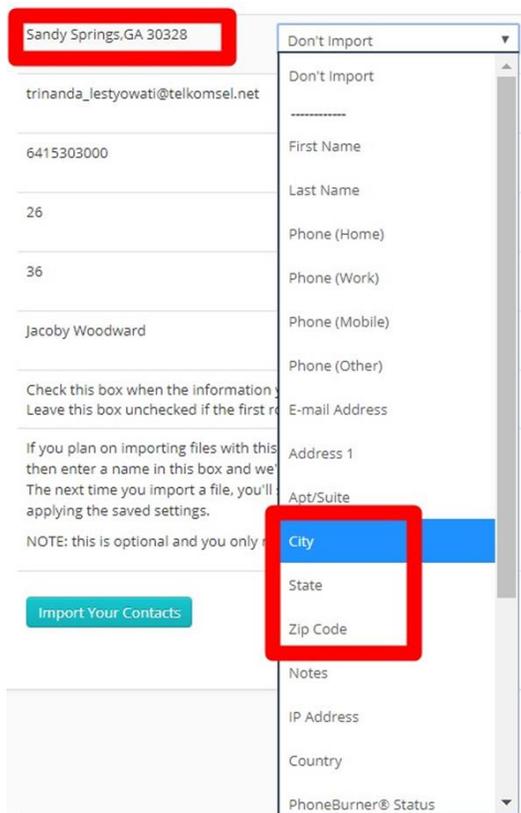
If you plan on importing files with this information, then enter a name in this box and we will save it. The next time you import a file, you'll be applying the saved settings. NOTE: this is optional and you only need it if you have more than one of the same type of information.

[Import Your Contacts](#) [Save Template](#)

If you have just numbers in a column with no headers, that you want to import, if you don't know what the number represents by column header, you could make mistakes on the import.

#3 in the sample file shows the data in the city column.

Note that some of these contacts show the city, state and zip all in that column. If you import the data this way, it will load in the system but if you needed to later search for a contact by zip code, you would not be able to do the search because there is no zip field in the csv and it is part of the city. You should divide this into separate columns whenever possible.



Improper import:

Profile Activity Demographics Changes Leadstream Timeline Documents

Contact Information

Name: Jacoby Woodward +

Phone: (641) 530-3000 (Work) + ☒ 📞

Email: trinanda_lestyowati@telkomsel.net + ☒

Address: 4502 Roswell Street NE
Sandy Springs, GA 30328 ☒

Custom Fields

Company Name: Budget Rent a Car

Website: Click to edit

Product: Click to edit

DOB: Click to edit

Age of owner: 26

Years in business: 36

Status

Current Folder: Test contacts

PhoneBurner® Status: None

Date Added: Oct 13, 2017 4:35 pm

Source: Import

Email Status: Restricted · Unsubscribe

Zip: [v] Equals [v] 30328 [Reset] [Search] [Advanced Search v]

? No results found.

Properly imported data:

Contact Information

Name: Jacoby Woodward +

Phone: (770) 530-3000 (Other) + ☒ 📞

Email: trinanda_lestyowati@telkomsel.net + ☒

Address: 4502 Roswell Street NE Apt/Suite
Sandy Springs Georgia v
State / Province / County (Other)
30328 Choose Country... v

☑ ☒

Zip: [v] Contains [v] 30328 [Reset] [Search] [Advanced Search v]

☐ [Begin Dial-Session] [Add Event] [Move v] [More v]

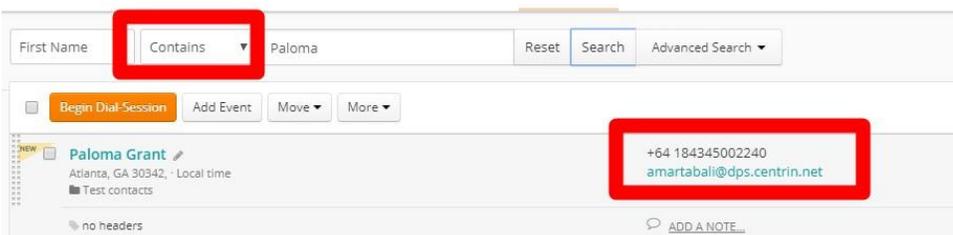
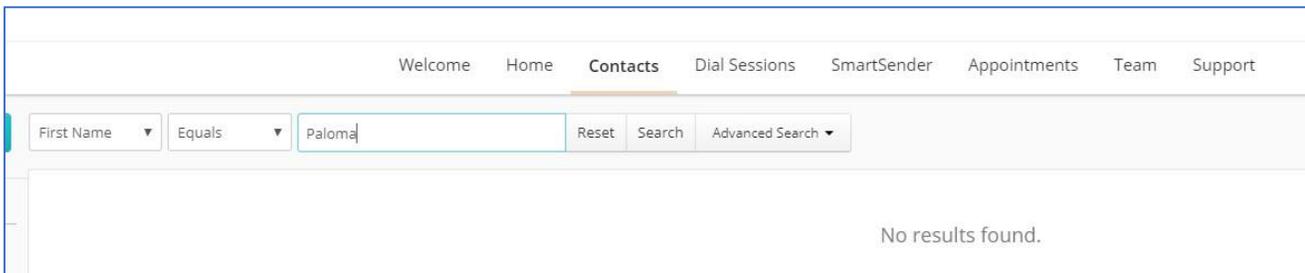
- Kristian Cooley** (770) 228-4240 bliss@thebale.com
Sandy Springs, GA · Local time 3:30 PM
☑ Test contacts
Headers ADD A NOTE...
- Humberto Fields** (770) 322-1117 yogya@jayakartahotelsresorts.com
Atlanta, GA · Local time 3:30 PM
☑ Test contacts
Headers ADD A NOTE...
- Steve Lang** (770) 257-2255 bali@tuguhotels.com
Atlanta, GA · Local time 3:30 PM
☑ Test contacts

For information on how to split a cell in excel in to multiple cells see : <https://support.office.com/en-us/article/Split-a-cell-f1804d0c-e180-4ed0-a2ae-973a0b7c6a23>

Here is what the data looks like after the split done twice for state and zip.

	C	D	E
	City	State	Zip
	Sandy Springs	GA	30328
	Atlanta	GA	30342
	Atlanta	GA	30342
	Atlanta	GA	30350
	Atlanta	GA	30328
	Sandy Springs	GA	30328
	Sandy Springs	GA	30328
	Atlanta	GA	30340
e 202	Sandy Springs	GA	30344
	Atlanta.	GA	
	Atlanta	GA	
	Atlanta	GA	

This also had to be done for the phone column (#4) as there was extra data in the phone number that would import. incorrectly



The extension is merged into the number

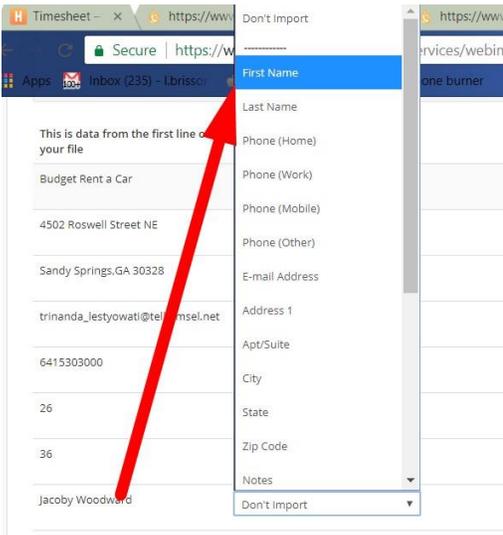
When done correctly with the extension in a separate field, the number shows correctly.



Bad vs Good data:

			G	H	
Phone	Ext.	Numb	Phone	Ext.	Numl
6415303000			6415303000		
6417424244			6417424244		
6418434500 EXT 2240			6418434500	EXT 2240	
7703242100			7703242100		
			6412572255		

And for the Owner name (#5) as well. This could have been imported as one NAME, however First Name and Last Name is better as it allows easier import and searches. If both names are together, they would need to be imported into the first name column.



	K	L
36	Jacoby	Woodward
27	Brodie	Avila
50	Paloma	Grant
46	Harrison	Herman
15	Steve	Lang
18	Malik	Savage
46	Kristian	Cooley
25	Danna	Lowe
43	Karlee	Cantu
29	Jade	Kirby
46	Tyshawn	Morrison
47	Edwin	Blanchard
44	Skyler	Norman
26	Journey	Bradshaw
21	Aleah	Sawyer
29	Hugo	Fletcher
48	Michael	Parks
43	Anabel	Burgess
26	Siena	Olsen
32	Jayda	Bowen
41	Michelle	Tucker
17	Valentin	Torres
48	Roderick	Tanner
39	Haylee	Stanley

	K	L	M
	owner name		
	Jacoby Woodward		
	Brodie Avila		
	Paloma Grant		
	Harrison Herman		
	Steve Lang		
	Malik Savage		
	Kristian Cooley		
	Danna Lowe		
	Karlee Cantu		
	Jade Kirby		

Finally...we are ready to do the import with the cleaned up file.

Go to **Home> Import Contacts or Contacts>Import**

1. Choose your file:

Sources

Select a source:

csv

Chamber of C...sample .csv

2. Tags and Saves search is optional, however recommended as an easy way to find the imports later in case you make a mistake and need to remove them or want to move them.

Tags

Select the tags you'd like added to the imported contacts. This is optional.

New Contacts 10-19

Create a saved search with the name. This is optional.

clean with headers

3. Select a folder to put them in. Do you want them in the same folder as everything else or do you need to go back to create a new one. (If you use tags and/or a saved search you can do this later by moving them if you have an admin or individual account. A team member may need to get admin approval to move or delete.

Contact Manager Folders

Select where your contacts will be imported.

4. Choose how you want to handle duplicate contacts.

Duplicates

How do you want to handle duplicates?

You can remove all duplicates based on email or phone, allow duplicate phones, allow duplicate emails, or allow all duplicates

When an imported contact matches a number on that list, apply this rule. A contact is considered a match

%

5. Choose how you want to handle DO NOT CALL numbers:

DNC Scrub

Scrub this list against your DNC. When an imported contact matches a number on that list, apply this rule. A contact is considered a match when any of the contact's numbers are found on your DNC.

Continue →

After hitting **continue**, you are ready to map the columns up to the contact manager fields in PhoneBurner.

your file	How do you want it imported?	
Company	Company Name	
Address	Address 1	
City	City	
State	State	
Zip	Zip Code	
Email	E-mail Address	
Phone	Phone (Home)	
Ext.	New Custom Field	extension Text
Number of employees	New Custom Field	Number of employees Text
years in business	New Custom Field	Years in Business Text
First name	First Name	
Last name	Last Name	

NOTE: the name of the contact manager field does not need to match the CSV file header. You are matching the data from the fields into the correct places in the contact fields.

column headers from CSV your file How do you want it imported? Fields in Phone Burner

Company	Company Name	1
Address	Address 1	2
City	City	3
State	State	4
Zip	Zip Code	5
Email	E-mail Address	6
Phone	Phone (Home)	7
Ext.	New Custom Field	extension 8
		Text
Number of employees	New Custom Field	Number of employees 9
		Text
years in business	New Custom Field	Years in Business 10
		Text
First name	First Name	11
Last name	Last Name	12

Name	11	Paloma Grant	12
Phone		(770) 843-4500 (Other)	7
Email		amarabali@dps.centrin.net	6
Address	2	4410 Roswell Street NE	Apt/Suite
	3	Atlanta	Georgia
		State / Province / County (Other)	
	5	30342	Choose Country...
		<input checked="" type="checkbox"/>	<input type="checkbox"/>

Custom Fields

Company Name:	AAA Auto Club	1
Website:	Click to edit	
Product:	Click to edit	
DOB:	Click to edit	
Age of owner:	Click to edit	
Years in business:	50	10
extension:	EXT 2240	8
Number of employees:	40	9

Example of how mapping matches up to Phoneburner.