

You can import your contacts into VBOT using a basic CSV file.

The way you do that, on the left panel, you can go to your contacts section and click on this gear icon and import contacts.

Now I also have another screen where I can do the same by going to my list from the top, finding out which list I want to import to, and from the drop down do mass import.

You'll see that on VBOT we let you do the same thing from different screens for your convenience.

Now what I do recommend before you start the import process is to create your master list on VBOT and include all the fields that you'd like.

First name, last name, email, company, number of employees, whatever really you'd like to capture, and make sure you have the proper data type, is it a date field like this one, what would you like to start, or is it a text field.

Always, always choose the right file or format of fields to import.

Once you've done that, load up your Excel, make sure it's a CSV format, and try to match if you can all the different columns that you have.

Now in this case, I did create some things to match and others that are not existing on VBOT, just to show you how you can create them on the go.

Now there's an email column here.

If you don't have emails and you're simply importing a list with phone numbers to do SMS, or for other management purposes, make sure that you turn off the required option under email address field.

You cannot remove it, but you can turn it off It's a required field by default, so make sure you get that setting on and then you can initiate the import.

Once you've matched and you've formatted the file in CSV, you can go ahead and initiate the mass import process.

The file has header, that means my Excel has a title on column one, and if any contact exists already, I would like to update it.

I'm going to choose the file and click Next.

Now you're going to notice here, it's trying to map the data My Excel has a company column.

On VBOT, I didn't create a company column I have something called company name, and VBOT couldn't really just match the name.

If you have the Excel file with the exact same labels, we will be able to match it.

Service date is, I can map it to, when would you like to start the service? Deal value, I do not have it in the system.

So because it's an amount, I'm just going to map it to a text field, but if it was a date, I probably should map it

to a date field.

So please make sure you make the distinctions between your date fields and your text fields.

Maybe I don't need full name, I have full first and last, but if you'd like to capture it, I can just create a new field for that.

The phone number was mapped, that was easy, and the email was mapped.

And import You'll see this thing, pending import, we're going to literally vet every column and every type of data, every character,.

and there are thousands of different things that could go wrong with your Excel, so we really filter out a lot of the stuff, and we produce the end results under your contact section.

So you can see my contact editor right here, with the company name, and the rest is being imported.

Now because I use the same email across the board, it might not have allowed me to import it multiple times.

Another way to trick the system to do that is to go to Reform Builder, Settings, and click Allow multiple submissions from the same contact and Save.

And that's pretty much it.