



Cheatsheet: Formatting data for import

Dates

Correct format: YYYY-MM-DD

2021-01-31
2020-01-31
2020-02-29

TIP: In excel, you might need to use Cell Format to select this format.

Multiple Values

Multiple values should be separated by semi-colons, you can also add labels using a colon. Spaces are ignored.

email address
ajohnsson0@house.gov; sup@whas.on
acressingham1@example.com:Work; abdul@example.com:Home;

Checkboxes

For checkboxes, you should use 0 to mean unchecked and 1 to mean checked.

Opted In
0
1

Tags

Use a comma-separated list of Tags, if tags do not exist they will be created.

Types
Agent, Musician
Supplier



Connections

You can connect data together using a single unique field.

For example, you might have a list of organisations which you upload first:

Name	Phone
Good Technologies Limited	033
Arts Council England	016
Youth Music	020

We can connect a person to the organisation by using the single field Name in the data above, our people data might look like this:

title	FIRST NAME	Surname	organisation
Ms	Maddy	Cressingham	Good Technologies
Mr	Abdul	May	Arts Council England
Ms	June	Courvert	Arts Council England
Mr	Maddy	Hewitt	Youth Music
Ms	Devan	Hams	youth music

Note that data in the organisation column in our People data matches the data in the Name column of our Organisations data. We can now tell GoodCRM to create a connection by matching these fields.

Connect to	organisation
Organisations.name (Organisation connection)	Good Technologies
Organisations.logo (Organisation connection)	Arts Council England
Organisations.address (Organisation connection)	Arts Council England
Organisations.name (Orgar	Arts Council England

Creating multiple connections in one field

To create multiple connections, use a comma-separated list, in this case in your People spreadsheet.

title	FIRST NAME	Surname	organisation
Ms	Maddy	Cressingham	Good Technologies, Youth Music
Mr	Abdul	May	Arts Council England
Ms	June	Courvert	Arts Council England
Mr	Maddy	Hewitt	Youth Music
Ms	Devan	Hams	youth music

Connecting People

You can only use a single field to connect data, so you can use First name and Last name fields. To connect people, use an email address, or upload a unique id for each person, or any other reliably unique single field.

