

CPApp

Uploading Contacts: Creating the Import File

- The import file must be an Excel file with a .xls or .xlsx extension
- The first row of data in the file should contain the column headings. It must contain these columns in this exact order.
 - first_name
 - last_name
 - email
 - phone
 - company
 - spouse_name
 - spouse_dob
 - address
 - city
 - state
 - zip
 - mobile
 - fax
 - alternate_email
 - website
 - birth_date
- The following rows would contain the data for import paying attention to the columns where the particular type of data should be.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	first_name	last_name	email	phone	company	spouse_name	spouse_dob	address	city	state	zip	mobile	fax	alternate_email	website	birth_date
2	TJ	LeBoot	tjleboot@gmail.com	203-816-6065	CPApp LLC	Sally LeBoot	04/20/82	100 Corporate Drive	Trumbull	CT	6611	203-346-8836	203-222-2222	ted@cpapp.io	www.cpapp.io	03/05/82
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Above is an example of what the Excel file would look like.