

How To:

Import Leads and Create Custom Fields

Learn how to accomplish two important tasks with one simple action in SharpSpring: import leads and create custom fields by uploading a single .csv file. You'll see how a veterinarian's office runs more smoothly and markets more effectively using this quick data import technique.

Learn How To:

- Import leads with data unique to your business, in this case, dog owners, cat owners, vaccinations and more.
- Create custom form fields including dropdowns and checklists.

Why It's Helpful:

- Market and cross-promote services to customers based on their interests (in this case, the type of pet).
- Provide more accurate, targeted content.
- Improve customer satisfaction by ensuring staff know clients' needs, because everyone has access to the same information in your database.
- Improve record-keeping and organization by keeping your customer and prospect information in one place.

Watch And Learn:

This example was part of a SpringBoard Live how-to session. [View on-demand video.](#)

The Situation

Having captured customer data in a .csv file, the vet's office uploads this data to SharpSpring so that they can use it to better serve their customers and organize their database.

Through SharpSpring, the vet can set up automated appointment reminders, track the progress of their clients' pets' recovery, send out notifications of new grooming services, or even send out targeted flea prevention and treatment medications to specific clients who could use them.

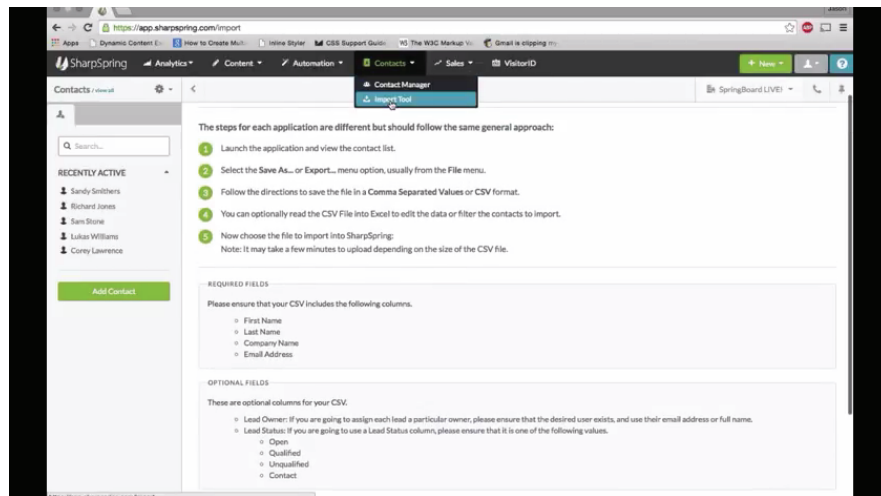
How To Do It:

Import a CSV File

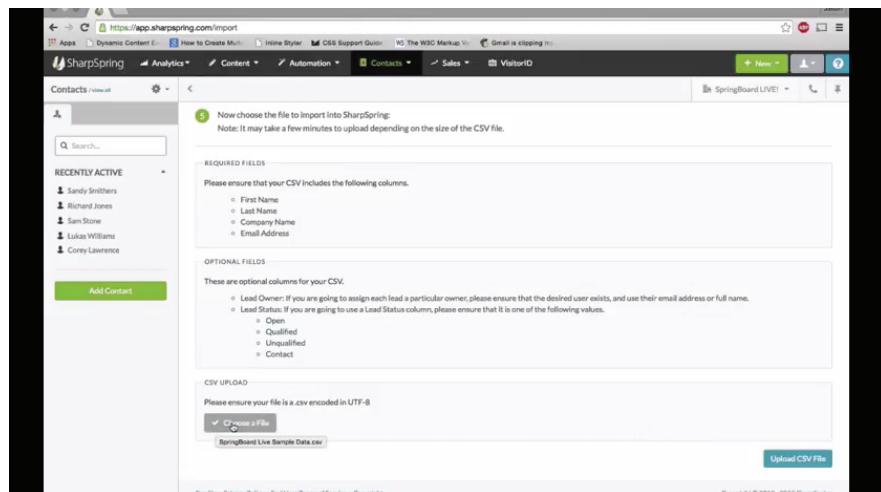
This is useful for uploading external information to SharpSpring quickly and easily.

***SharpTip 1:** *The company column is required with the header labeled "Company," but those fields do not need to be populated with data.*

1. Navigate to Contacts and select Import Tool.



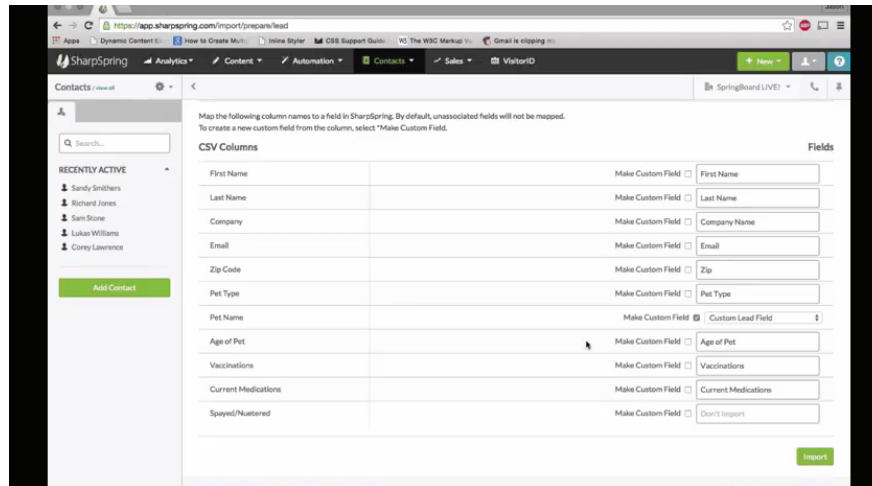
2. Click Choose a File and select the file that you want to import. The checkmark on the Choose a File button indicates your file has been imported.



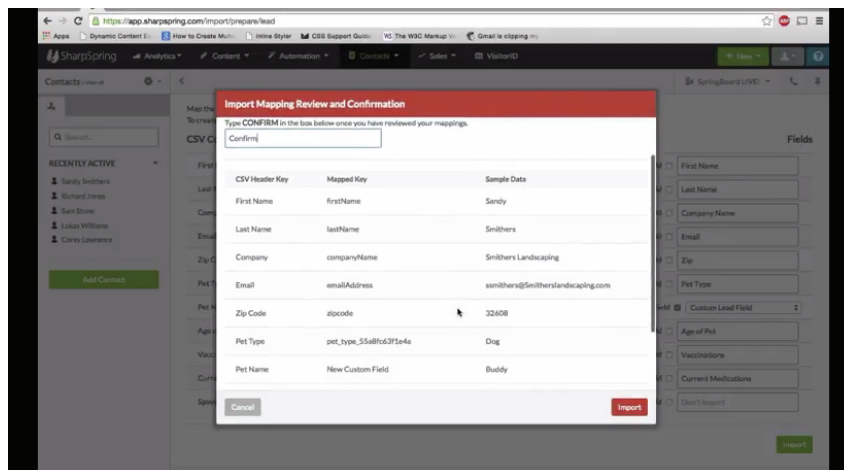
***SharpTip 2:** If you hover over the Choose a File button, you can see which file you selected.

3. Click Upload CSV File.

4. All of the columns from your original spreadsheet will display on the left, and you can match them to fields in SharpSpring on the right. To create a new field that doesn't already exist in SharpSpring, select Make Custom Field. You can go back later to build out this field.



5. Click Import, type “confirm” in the popup box, do a quick review to be sure the information is correct, and click Import.



6. Click View List to go back and see the custom fields you created.

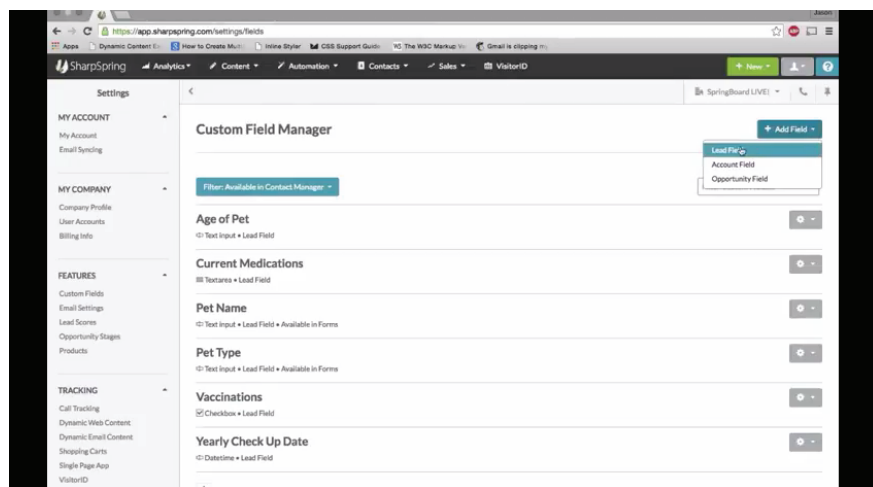
Manage and Review Custom Fields

The option to create custom fields allows you to get as specific as you want when it comes to learning about your customers' interests. Once you've created a new custom field, you can incorporate it into any given form in the future, which saves you time and allows you to begin gathering that information on the front end.

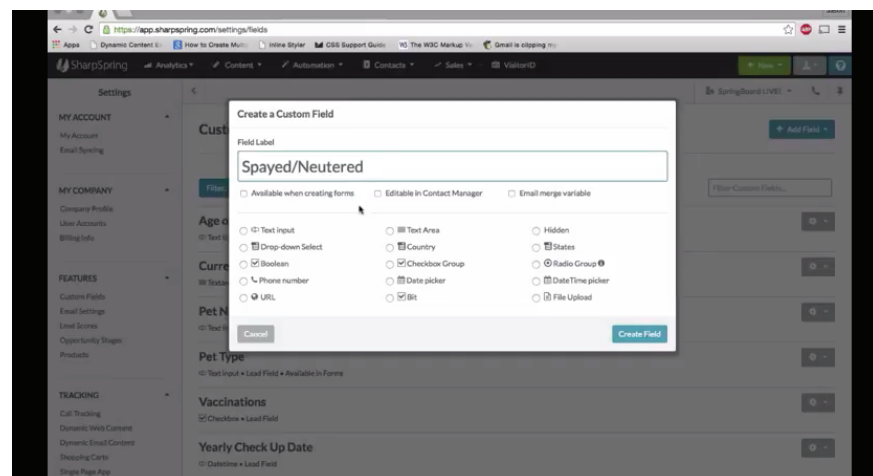
In this example, we created a custom field to indicate whether a pet was spayed or neutered. This field was then available to incorporate into forms in the future. The more specific and interactive your forms are, the easier it will be to turn your data into useable information. Additionally, these highly customized forms not only give more detailed, useful information on your client base, but also improve the user experience for your customers.

1. There are two ways to create a new custom field. (i) Click on your profile, click Settings, then select Custom Fields under the Features section on the left; or (ii) navigate to New and click on Custom Field. Both options will bring you to the Custom Field Manager page.

2. To create a new field, click the Add Field button in the top right corner and select the type of field you want to create.



3. A popup box entitled “Create a Custom Field” will display, and you can type in a field label.



4. Below the field label, you are presented with a three options for your field: (i) make the field available when creating forms; (ii) allow the field to be editable in the contact manager; and (iii) merge your data with your emails for personalization purposes.

***SharpTip 3:** *The first option allows you to easily add your custom field to any relevant forms in the future.*

5. Next you can choose the type of custom field you want to use, such as dropdown, country selector, datepicker, etc. In this example, we selected a dropdown list.

6. After selecting the type of field, you can map out how the data from your .csv file is displayed in the SharpSpring form.

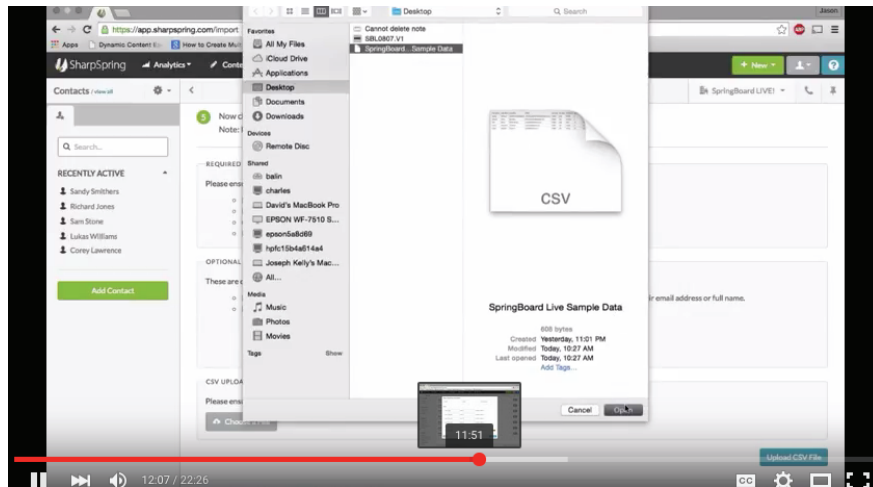
CSV Columns	Fields
First Name	Make Custom Field <input type="checkbox"/> First Name
Last Name	Make Custom Field <input type="checkbox"/> Last Name
Company	Make Custom Field <input type="checkbox"/> Company Name
Email	Make Custom Field <input type="checkbox"/> Email
Zip Code	Make Custom Field <input type="checkbox"/> Zip
Pet Type	Make Custom Field <input type="checkbox"/> Pet Type
Pet Name	Make Custom Field <input type="checkbox"/> Pet Name
Age of Pet	Make Custom Field <input type="checkbox"/> Age of Pet
Vaccinations	Make Custom Field <input type="checkbox"/> Vaccinations
Current Medications	Make Custom Field <input type="checkbox"/> Current Medications
Spayed/Neutered	Make Custom Field <input type="checkbox"/> Spayed/Neutered

***SharpTip 4:** *Remember that “values” represent how the information is listed in your .csv file, while “labels” represent how the information displays in your user interface, emails and forms.*

***SharpTip 5:** *SharpSpring allows for abbreviations for quick data input. In the vaccinations section of our example, the user could change each value to the first letter of the vaccination in the corresponding label. This way, the user can quickly and easily input long lists of values, separated by commas, in a spreadsheet; when he/she imports these values later, they will display as the full label names for better readability.*

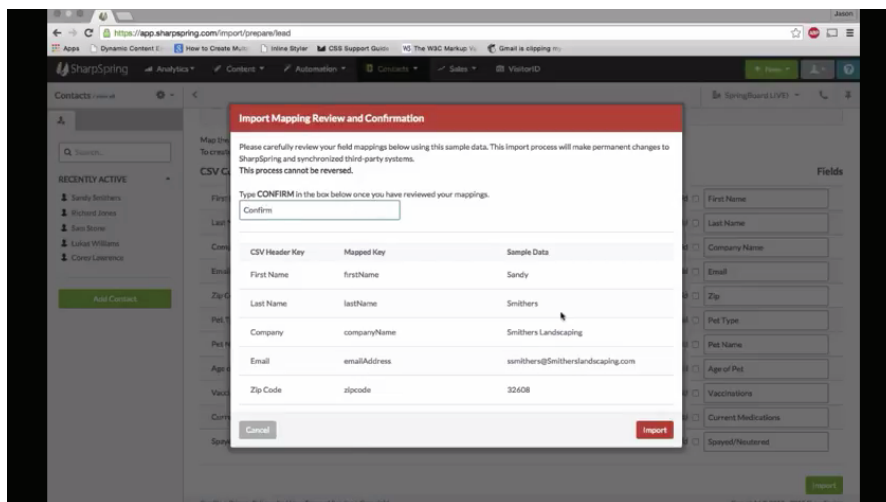
7. Now that you have created your new custom field, navigate back to Contacts > Import Tool, and re-upload your original .csv file.

***SharpTip 6:** *It’s important to note that SharpSpring will automatically organize duplicate records and assign information to the relevant email addresses.*



8. Now you can select your new custom field in the list of fields and click Import at the bottom of the page.

9. When the popup box displays, type "confirm" in the space provided, do a quick review to be sure the information is correct, and click Import.



10. To confirm that the information is displaying correctly in your custom field, click View List and click on one of the items to compare the labels in the form with the values in your .csv file.