Uploading Contact Records

MUST KNOW:

- **Unique identifier = Email**. A unique identifier is a completely unique piece of information, such as an email address. For example, you can have two John Smiths, but you can only have one johnsmith@gmail.com.
    - If you're uploading additional client information (they already have a record in Compass) you must use their email (the unique identifier) to match the records properly. Otherwise, Compass will create a duplicate record.
- If you're missing a value/piece of information for a client, just leave it BLANK.
    - DO NOT enter N/A, missing, none, etc.
- **.CSV = Comma Separated Values.** When uploading a list of information into a Compass field, each item must be separated with commas **ONLY**.
- If you do not upload records with their 'Email Status' attached, Compass will automatically set email status to '**Not Opted In**.'
- **Best Practice**: Do a test run of ~5 clients prior to uploading contacts in bulk.

Step 1: Download the Template from Compass

Step 1: Download the Template from Compass Login to Compass -> Go to Contacts -> Click the dropdown arrow next to the 'NEW CONTACT' button -> Select 'Upload Contacts' -> There's a green 'DOWNLOAD TEMPLATE' button, click on that & open the template. "Enrollments by Product".

Step 2: Fill Out the Template

We recommend copying and pasting your client information, column by column, into the template. Field options are explained in the 'Compass Field Guide.'

Step 3: Review & Save Template

- Ensure all necessary information is noted on your template.
- Add additional information you'd like. (Such as gender or client status.) Use the 'Field Guide' for more information.
- Delete unused columns.
- Delete the example row. (Kizen Support - Row 2)
- Values are separated by commas ONLY.

****Pro Tip** Excel's Find & Replace function (Ctrl +H) allows you to change values in bulk. ***

****Field options are explained in 'Compass Field Guide.'***

Once you're happy with your template, **save** it to your computer.

Step 4: Upload Template

Go to Contacts -> Click the dropdown arrow next to 'NEW CONTACT' button -> Select 'Upload Contacts'

Step 5: Final Review & Upload

First time uploading these contacts? Since we used the Template, we can skip the second step 'Matching Records' and scroll down to the third step 'Finalize Upload' and review the information one last time. Compass only shows the first 5 records that are being uploaded. If it looks good –

Click '**UPLOAD**'

Do these contacts already have a record in Compass? Choose how Compass should import information for existing clients.

**Reminder: You must use their email to properly match up the existing Compass record to the client information that's being uploaded. Otherwise, Compass will create a duplicate record.

When you've made your selections, review the first 5 records. If they look good –

Click '**UPLOAD**'

What's Next?

You'll receive an email from Support@Kizen.com when your contacts have been successfully uploaded. At that time, you can refresh Compass, and your data will appear. If the new records aren't showing up, make sure you don't have any filters on.