

# Importing Contacts in Bulk

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This article will cover how to import a large number of Contacts into Chairty OS at once using the Bulk Import tool for Contacts.

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## Preparing for Import

To make your import process as smooth as possible, we've created a ready-to-use template. It takes the guesswork out of formatting, just copy the column names into your data file so the system can map everything correctly.

[Importer Template for Contacts and Donations](#) 

A little prep goes a long way. Here are a few things to check before uploading your file:

- Use consistent formats for dates and phone numbers across the file.
- Keep names separate: First, Middle, and Last should each have their own column.
- Organization names should go in their own column (not under First Name).
- Double-check your settings: Make sure prefixes, organization types, and other fields are already set up in Charity OS.
- Save your file as a .CSV or .XLSX.

**Tip:** Look out for column colours in the template:

- **Green = Mandatory**
- **Yellow = Recommended**
- **Grey = Optional** (you can skip these if they're not relevant)

1. Download the import templates zip file, which includes both the Contacts and Donations import templates.
2. Copy and paste all **Mandatory** headers, along with any **Recommended** and **Optional** headers, from the template file into your existing file, or copy and paste your data into the corresponding columns in the template file.
3. Make sure to save the data you're importing as a Comma-Separated Values (.CSV) file or a Microsoft Excel Spreadsheet (.XLSX).

**Note:** If your existing file is missing a column (for example, if the donor's first and last names are in one column in your file, but Charity OS separates them), you'll need to add the missing column (e.g., for the last name). Then, simply copy and paste all the last names into the new column.

copy and paste the column names into your data file

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## Accessing the Import Tool

Once you've organized your data, you're ready to start importing!

1. To access **Settings**, click on the gear icon in the top-right corner of your account.

2. Select **Import data**.

Select Import data

3. When you're ready to begin the import, click on **Next**.

4. Select **Contacts** from the drop down list option.

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## Importing Your Contacts

### 1. Upload and Sheet Selection

To upload your file, either drag and drop your file into the box or click on **Select files** to locate the file in your computer to upload the file. The accepted file types are .CSV, .XLS.

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## 2. Header Selection

From the file uploaded, select the row that contains the header information (**usually the first row**). This row will identify the labels for each column and help Charity OS map the data correctly.

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## 3. Match Columns

Charity OS will try to match your column headers automatically based on common keywords. If something doesn't match or gets matched incorrectly, just click **Select** next to the column. You can then search for the correct field or scroll through the list to find the right one.

**If an option is missing:** for example, if you're trying to select **School** under *Organization Type* and it's not showing up, you'll need to add it first. Refer to [this article](#) on how to new Contact options:

- (in a new tab) click on **Settings**
- Select **Contacts**, then **Organizations**
- Add the missing option there

Once that's done, return to your import tab and click on **Back**. This refreshes the available options so the one you just added appears in the list. Don't worry, you won't lose your entire progress. You'll just be taken back one step in the process, and can pick up right where you left off.

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Once all the fields have been mapped and the checkmarks on the right turn green, click on **Confirm**.

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#### 4. Review Entries

If there are errors with any of the entries (such as):

- **Empty fields:** for mandatory columns.
- **Invalid formats:** for dates or phone numbers.

Charity OS will flag these issues by showing the number of affected rows in the **Error Rows (#)** tab.

To fix them, just click on **Find Error**. That'll jump you right to the row with the issue. Look for the **red-highlighted cell**, double-click it, and make your correction directly on the page.

Once you've gone through and fixed all the errors, just hit **Complete Import** to finish things up!

Find and fix errors

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## What's Next?

Once you've finished importing all of your Contacts, you may want to check out how to use the Import Tool to [bulk upload Contributions](#) as well.

Or, if you've finished with all of your bulk importing, go ahead and check out all of this newly-imported Contact data in your Charity OS!