

CRM import readiness check

Row & Page | Free 10-point checklist | Sample with fictional data.

Run these 10 checks on your contact CSV before you import it into your CRM. The advice is general and works for most CRMs. The examples come from our fictional sample files, `sample-before.csv` and `sample-after.csv`.

- 1. One header row.** Why: we treat the first row as the field names, so we move titles, notes or a second header row out of the file. Example: keep a single row like `Full Name,Email,Phone,Company,State,Created,Lead Source` at the top.
- 2. Required fields filled.** Why: we check that every row has the fields you mark as required before it goes into the import file. Example: in our sample, the row for Lena Ortiz has no valid email, so we held it back and listed it for review.
- 3. Unique emails.** Why: we keep one row per person, so a person is not imported twice. Example: `jordan.rivera@example.com` and `Jordan.Rivera@Example.com` are the same address once case and spaces are ignored, so we merged them into one row.
- 4. Names split into first and last.** Why: we put first and last name in separate columns, so a greeting can use the first name. Example: `Patel, Asha` becomes `First Name Asha, Last Name Patel`.
- 5. One phone format.** Why: mixed formats make duplicates hard to spot and look messy in the CRM. Example: `312.555.0101` and `(312) 555-0101` both become `(312) 555-0101`.
- 6. One date format.** Why: we write every date the same way, so a date like `03/04/2026` is not left open to two readings. Example: `2026/02/11` and `02/12/2026` become `2026-02-11` and `2026-02-12` (YYYY-MM-DD).
- 7. State codes.** Why: `New York` and `NY` in the same column split reports and filters. Example: `Illinois` becomes `IL`.
- 8. Junk and test rows removed.** Why: test rows end up as fake contacts in lists and counts. Example: rows like `test test` and `asdf` were removed from our sample.
- 9. Company names consistent.** Why: spelling variants of one company look like different accounts. Example: `Brightline Supply Inc` and `Brightline Supply, Inc.` become `Brightline Supply Inc.`
- 10. Fields mapped.** Why: we match every column to a field in your CRM before import, so no column is left out by mistake. Example: our sample column `Created` maps to `Create Date`, and `Full Name` maps to `First Name` and `Last Name`.

What our sample excerpt shows

10 rows in `sample-before.csv` become 5 rows in `sample-after.csv`: 2 rows were merged as duplicates, 2 junk rows were removed, and 1 row was held back for a missing email. One of those 5 rows is flagged because it shares a phone with another contact but has a different email. `sample-exceptions.csv` lists each change with its source row.

Want us to do it?

We clean contact CSVs so they are ready to import: <https://rowandpage.pages.dev/crm-cleanup/>

Fully asynchronous - no meeting required.

Sample with fictional data. Every name, company, email and 555-01xx phone number in it is made up.