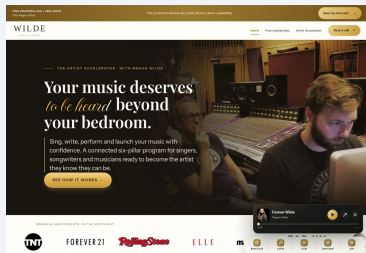


Contact import preparation

Prepare a clean import instead of bringing old problems into a new CRM.



FROM THE SETLY PROJECT LIBRARY

A real project screenshot for visual inspiration. Follow the written steps for your own business.

YOUR ACTION PLAN

- 1 Keep an untouched backup of the original export.
- 2 Standardize field names and review obvious duplicates.
- 3 Separate marketing preferences and do not assume an imported address permits messaging.
- 4 Import a small sample first and inspect field mapping before the full import.

EXAMPLE - ILLUSTRATIVE

A spreadsheet's Notes column should not accidentally become a contact's company name.

CHECK YOUR RESULT

Did the sample import preserve contact details and preferences correctly?

Contact import preparation

Use the prompts below to make this resource specific to your business. Save a local copy after completing it. Keep passwords and private customer data out of this worksheet.

Source:**Export date:****Field mapping:****Duplicate handling:****Communication preferences:****Sample result:****DONE WHEN**

Did the sample import preserve contact details and preferences correctly?

FURTHER READING

[HighLevel Support](#)

Independent Setly planning resource. Platform settings and requirements can change; use the linked official help for current configuration details.