C MART ™ APP | QUICK SETUP GUIDE

CREATE OR UPLOAD YOUR CONTACTS

Two ways to get your contacts into the CMART™ App — add them one by one, or import an entire list from a CSV file in minutes.

GUIDE #001

BEGINNER FRIENDLY

⏱ 10-15 MIN

YOU'LL LEARN:

- Create a contact manually
- Prepare a CSV file correctly
- Import contacts in bulk
- Map fields + avoid duplicates
- Check your import results

⚠ BEFORE YOU START

→ You need **Admin access** in your CMART™ App account to import contacts. Standard users cannot import.

→ If importing a list, your file must be in **.csv format** — not Excel (.xlsx) or Google Sheets directly. Export first.

→ Each contact needs at least one of: **name, email address, or phone number**. Rows without any of these will fail.

→ Phone numbers for South African contacts should be in **international format**: `'+27821234567` (add an apostrophe before the + sign in Excel/Sheets to prevent formatting errors).

METHOD A — CREATE A SINGLE CONTACT MANUALLY

Use this method when you want to add one contact at a time — a new lead, a client you just spoke to, or someone who called in. It takes about 60 seconds per contact.

1 GO TO CONTACTS

In the left-hand sidebar of your CMART™ App dashboard, click **Contacts**.

DASHBOARD › CONTACTS

2

CLICK "ADD CONTACT"

In the top right corner of the Contacts page, click the **+ Add Contact** button (or the blue button labelled "New Contact" depending on your view). A contact creation panel will slide open on the right.

3

FILL IN THE CONTACT DETAILS

Enter the contact's information. At minimum, fill in one of: **First Name, Email, or Phone Number**. The more you fill in, the better your automations will work.

> 💡 **Tip:** Always add both email and phone number if you have them. Your CMART™ automations use both WhatsApp (phone) and email to follow up leads — a contact with only one means half your automation won't fire.

4

ADD TAGS IF RELEVANT

Scroll down to the **Tags** field. If this contact came through a specific source or should be added to a workflow, add the relevant tag here. For example: `solar-lead`, `hosting-paid`, or `cmart-starter-trial`. Tags trigger your automation workflows automatically.

5

CLICK SAVE

Click the **Save** button at the bottom of the panel. The contact is now in your CRM and will appear in your Contacts list. Any automation workflows triggered by their tags will fire immediately.

METHOD B — IMPORT A CONTACT LIST VIA CSV

Use this method when you're moving contacts from another system, uploading a client list, or adding a batch of leads at once. You can import hundreds or thousands of contacts in one go.

1

PREPARE YOUR CSV FILE

Open Excel, Google Sheets, or Numbers and set up your spreadsheet with these column headers in the first row. The file must have **only one sheet/tab** and be saved as **.csv format**.

COLUMN HEADER	EXAMPLE	NOTES
First Name REQUIRED*	Johan	*At least one of Name, Email, or Phone is required
Last Name OPTIONAL	van der Merwe	
Email RECOMMENDED	johan@example.co.za	Used for email automations and de-duplication
Phone RECOMMENDED	'+27821234567	Add apostrophe before + in Excel to prevent errors
Tags OPTIONAL	solar-lead	Separate multiple tags with a comma
Source OPTIONAL	Facebook Ads	Where the lead came from
Business Name OPTIONAL	ABC Solar Solutions	Automatically creates and links a company record
Address OPTIONAL	12 Main Road, Sandton	

⚠ **South African phone numbers:** In Excel or Google Sheets, type an apostrophe before the + sign like this: `'+27821234567`. The apostrophe tells the spreadsheet to treat it as text, not a formula. It won't appear in the final CSV.

2

GO TO CONTACTS AND CLICK IMPORT

In the left-hand sidebar, click **Contacts**. Look for the **Import** button in the top toolbar — it looks like a downward arrow pointing into a box.

CONTACTS › IMPORT BUTTON (↓ ICON)

3 SELECT WHAT TO IMPORT

You'll be asked what you want to import. Choose **Contacts** (unless you're also importing sales opportunities, in which case select both). Click **Next**.

✓ CONTACTS | CONTACTS + OPPORTUNITIES

4 UPLOAD YOUR CSV FILE

Click **Upload File** and select your CSV from your computer, or drag and drop it into the upload area. The CMART™ App will load your file and read the column headers.

ℹ **File size limit:** Your CSV file must be under 30MB. If your list is larger, split it into multiple files and import them separately.

5 CHOOSE HOW TO IMPORT CONTACTS

Select the import type that matches your situation:

OPTION	WHEN TO USE IT
Add New Contacts Only	You're uploading a brand new list. Will not update any existing contacts in your system.
Update Existing Contacts Only	You want to update information for contacts already in your system. Will not create new contacts.
Add New + Update Existing	**Most common choice.** Creates new contacts and updates existing ones in one go. The system checks for duplicates by Email or Phone before creating a new record.

💡 **De-duplication order:** The CMART™ App checks for existing contacts in this order: Contact ID → Email → Phone. If a match is found, it updates that record instead of creating a duplicate.

6 MAP YOUR CSV COLUMNS TO CMART™ APP FIELDS

The app will display your CSV column headers on the left and let you match them to fields in the system on the right. **Green checkmarks** mean the field is correctly mapped. **Yellow warning triangles** mean a field needs attention.

> ⚠ **Custom fields:** If your CSV contains columns for custom fields (e.g. `preferred_domain_name`), those custom fields must already be created in your CMART™ App account before importing. Unmapped columns are ignored automatically — they won't cause the import to fail, but that data won't be saved.

7 REVIEW FINAL SETTINGS (OPTIONAL BUT RECOMMENDED)

Before confirming the import, you can optionally:

- **Add a tag** to all imported contacts — useful to identify which batch they came from (e.g. `imported-april-2026`)
- **Add contacts to a Workflow** — trigger an automation sequence for all imported contacts immediately
- **Create a Smart List** — automatically group these contacts into a filtered list for easy access later

> ℹ You must **check the consent checkbox** to confirm all contacts have provided consent to be contacted. This is required under POPIA (South Africa's data protection law) — do not import contacts who have not given consent.

8 CLICK IMPORT AND MONITOR THE PROGRESS

Click the **Import** button to start. The CMART™ App will process your file in the background. To check progress:

CONTACTS › BULK ACTIONS › SHOW STATS

The Bulk Actions page shows you: how many contacts were created, how many were updated, how many failed, and a downloadable error log if anything went wrong.

9

CHECK THE ERROR LOG IF NEEDED

If some contacts failed to import, click **Show Stats → Error tab** to download the error log. Common errors and fixes:

ERROR	FIX
Missing required field	Ensure each row has at least a name, email, or phone number
Invalid phone format	Use international format: `'+27821234567` with apostrophe in CSV
Duplicate within CSV	Clean your list before importing — remove duplicate rows
File too large	Split into multiple files under 30MB and import separately
Custom field not found	Create the custom field in Settings first, then re-import
Wrong file format	Only .csv is accepted — export from Excel or Sheets as CSV first

FREQUENTLY ASKED QUESTIONS

Q CAN I IMPORT WITHOUT AN EMAIL ADDRESS?

Yes — each contact needs at least one of: name, email, or phone number. However, contacts without an email address won't receive email automations. For the CMART™ Leads Engine to work fully, email is strongly recommended.

Q WHAT HAPPENS IF I IMPORT A CONTACT WHO ALREADY EXISTS?

If you chose **Add New + Update Existing**, the system will match the existing contact by Email or Phone and update their record with any new information from the CSV. No duplicate will be created.

Q CAN I IMPORT CONTACTS WITH MULTIPLE PHONE NUMBERS OR EMAILS?

Yes. Add additional emails in one column separated by commas, and map it to the **Additional Emails** field. Do the same for additional phone numbers. The primary email and phone remain as the main fields.

Q WILL IMPORTING CONTACTS TRIGGER MY WORKFLOWS AUTOMATICALLY?

Only if you specifically choose to add them to a workflow in Step 7, or if you add tags that have workflow triggers attached. Importing alone does not automatically fire all your automations — you control this.

Q WHAT IS A SMART LIST AND SHOULD I CREATE ONE DURING IMPORT?

A Smart List is a saved filter in your Contacts section that automatically groups contacts matching certain criteria. Creating one during import is useful if you want to quickly find and communicate with everyone from a specific batch — for example, all contacts imported from an old CRM or a trade show list.

Q I'M MOVING FROM ANOTHER CRM. WHAT'S THE BEST WAY TO MIGRATE?

Export your contacts from your old system as a CSV. Clean the file — remove duplicates, fix phone formats, ensure consistent column headers. Then use **Method B, Step 5: Add New + Update Existing**. Tag the batch on import so you can identify migrated contacts easily.

CMART™ App Quick Setup Guides
Guide #001 of a growing series — more guides added regularly to the Vault

NEXT: SETTING UP YOUR PIPELINE →