Request Secure Link
When ready to upload

Automatic Formatted Import Spreadsheet Guide

***** Important: Please be sure to review all data entered on the spreadsheet for accuracy before submitting it for import. We are not able to make changes to the data, or remove duplicate contacts, before importing everything to your database. *****

If you have any questions on the different fields listed on the Import Spreadsheet, please review the following for definitions and examples for each column.

A1: **Type -** Redtail defines contacts into Individuals, Businesses, Associations, Trusts or Unions. If this column is left blank, but a Name is listed in Columns C1- F1, then this will default to Individual. If this column is left blank, but a Name is listed in Column J1 (Companyname), then this will default to Business.

B1: **Salutation -** Ex: Mr., Mrs., Dr., etc. Full Names are not accepted as this is a limited character field.

C1: **First Name**

D1: **Nick Name** - This is any other name your client goes by, other than what is already listed in Column C1

E1: **Middle Name**

F1: **Last Name**

G1: **Suffix** - Ex: Jr., Sr. III, etc. Full Names are not accepted as this is a limited character field.

H1: **Designation** – Ex: MD, CFP, etc. Full Names are not accepted as this is a limited character field.

I1: **Family Name** - Family name is an open text field and is what you would like to appear in a mail merge document or letter sent to a family. Mr. and Mrs. Jim Smith, Jim and Mary Smith, The Smith Family, etc. If the Client is single, he or she will still need a family name. Ex, Jim Smith.

J1: **Companyname** - For Employers, Business Contact/Clients, Associations, Trusts & Unions. A Contact Record is created for this field. If listed as an employer, it will be linked back to the person listed in Columns C1-F1 as the contact's employer

K1: **Tax Id/SSN -** Contact/Client SSN or Tax ID

L1: **DOB -** Contact/Client Date of Birth. Must be formatted- Month/Day/Year (MM/DD/YYYY), or Month-Day-Year

M1: **Spouse First Name** - These columns will create a separate contact record, which will be linked back to the Head of Household (Listed in Columns C1-F1) under the Family Name section. If the spouse is also on this spreadsheet on a separate line, completing this field will create a duplicate record for this name.

N1: **Spouse Nickname**

O1: **Spouse Middle Name**

P1: **Spouse Last Name**

Q1: **Spouse Suffix –** Ex: Jr., III. Full Names are not accepted as this is a limited character field.

R1: **Spouse Designation** – Ex: MD, CFP. Full Names are not accepted as this is a limited character field.

S1: **Spouse Employer** - This Employer will be linked back to the Spouse Record. Only to be used if the Spouse Name was entered under Columns M1-P1

T1: **Spouse Tax ID –** Spouse's Social Security Number. Only to be used if the Spouse Name was entered under Columns M1-P1

U1: **Spouse DOB** - Spouse's Date of Birth. Only to be used if the Spouse Name was entered under Columns M1-P1

V1: **Marital Status** – This is a locked field. Your choices are: Unknown, Life Partner, Married, Divorced, Separated, Single, or Widowed.

W1: **Anniversary** - Wedding Anniversary. Must be formatted- Month/Day/Year (MM/DD/YYYY), or Month-Day-Year

X1: **Gender -** Please select from: Male, Female or Unknown. This is a static field.

Y1: **Spouse Gender** - Please select from: Male, Female or Unknown. This is a static field. Only to be used if the Spouse Name was entered under Columns M1-P1

Z1: **Job Title** - What the person does: Vice President of Sales, Director of Marketing, etc.

AA1: **Spouse Job Title -** What the spouse does: Vice President of Sales, Director of Marketing, etc. Only to be used if the Spouse Name was entered under Columns M1-P1

AB1: **Client Status -** Open Text field, examples include Client, Inactive, Prospect, Lead, Vendor, Professional Contact, etc.

AC1: **Spouse Status -** Open Text field, examples include Client, Inactive, Prospect, Lead, Vendor, Professional Contact, etc. Only to be used if the Spouse Name was entered under Columns M1-P1

AD1: **Client Category -** Open Text field, examples include A, B, C - OR - Gold, Platinum, Silver, Etc.

AE1: **Spouse Category -** Open Text field, examples include A, B, C - OR - Gold, Platinum, Silver, Etc. Only to be used if the Spouse Name was entered under Columns M1-P1

AF1: **Client Source** - Open Text field to indicate where the client came from, ex, Yellow Pages, Seminar, Referral, etc.

AG1: **Spouse Source -** Open Text field to indicate where the spouse came from. Ex, Yellow Pages, Seminar, Referral, etc. Only to be used if the Spouse Name was entered under Columns M1-P1

AH1: **Writing Advisor -** who wrote the business.

AI1: **Servicing Advisor -** who services the business.

AJ1: **Home Address** – This will automatically be marked primary

AK1: **Home Address 2**

AL1: **Home City**

AM1: **Home State**

AN1: **Home Zip**

AO1: **Home Zip4**

AP1: **Work Address1**

AQ1: **Work Address2**

AR1: **Work City**

AS1: **Work State**

AT1: **Work Zip**

AU1: **Work Zip 4**

AV1: **Mail Address 1**

AW1: **Mail Address 2**

AX1: **Mail City**

AY1: **Mail State**

AZ1: **Mail Zip**

BA1: **Mail Zip 4**

BB1: **Other Address** 1

BC1: **Other Address 2**

BD1: **Other City**

BE1: **Other State**

BF1: **Other Zip**

BG1: **Other Zip 4**

BH1: **Spouse Work Address 1**

BI1: **Spouse Work Address 2**

BJ1: **Spouse Work City**

BK1: **Spouse Work State**

BL1: **Spouse Work Zip**

BM1: **Spouse Work Zip4**

BN1: **Homephone** – This will automatically be marked primary

BO1: **Workphone**

BP1: **Homefax**

BQ1: **Workfax**

BR1: **Cellphone**

BS1: **Otherphone**

BT1: **Spouse Homephone**

BU1: **Spouse Workphone**

BV1: **Spouse Cellphone**

BW1: **Home Email** – This will automatically be marked primary

BX1: **Work Email**

BY1: **Other Email**

BZ1: **Spouse Home Email**

CA1: **Web Site -** Client's Web Page

CB1: **Client DL Number -** Driver's License Number

CC1: **Client DL State -** Driver's License State

CD1: **Client DL Issue -** Driver's License Issue Date. Must be formatted- Month/Day/Year (MM/DD/YYYY), or Month-Day-Year

CE1: **Client DL Expiration -** Driver's License Expiration Date. Must be formatted- Month/Day/Year (MM/DD/YYYY), or Month-Day-Year

CF1: **Spouse DL Number -** Spouse's Driver's License Number. Only to be used if the Spouse Name was entered under Columns M1-P1

CG1: **Spouse DL State -** Spouse's Driver's License State. Only to be used if the Spouse Name was entered under Columns M1-P1

CH1: **Spouse DL Issue -** Spouse's Driver's License Issue Date. Only to be used if the Spouse Name was entered under Columns M1-P1. Must be formatted- Month/Day/Year (MM/DD/YYYY), or Month-Day-Year

CI1: **Spouse DL Expiration -** Spouse's Driver's License Expiration Date. Only to be used if the Spouse Name was entered under Columns M1-P1. Must be formatted- Month/Day/Year (MM/DD/YYYY), or Month-Day-Year

CJ1: **Birth Place**

CK1: **Maiden Name**

CL1: **Passport Number**

CM1: **Green Card Number**

CN1: **Client Since -** Date Contact became a Client. Must be formatted- Month/Day/Year (MM/DD/YYYY), or Month-Day-Year

CO1: **Referred By** - Name of the Person or Business that referred client/prospect to you

CP1: **Primary Contact Name -** Primarily used for Business Records – this can be the name of an Assistant or other Primary Point of Contact for a Business, Trust or Association.

CQ1: **Primary Contact Phone -** Phone number for Person listed under Primary Contact Name

CR1: **Primary Contact Email -** Email address for Person listed under Primary Contact Name.

CS1: **Keywords -** Keywords are used to group various Contacts together, and can be used in an Advanced Search and to create Quick Lists. To add more than one Keyword to a Contact Record, please use Semicolons. Example: Keyword1; Keyword2; Keyword2

CT1: **Tag Group Name** - Tag Groups offer an alternative method of putting your contacts into easily accessible groupings that you can return to as needed. To add more than one Tag Group to a Contact Record, please use Semicolons. Example: TagGroup1; TagGroup2; TagGroup2

CU1 – DN1: **UD Fields -** User Defined Fields, to be used to keep track of additional fields not already listed. The UDF Title should be listed at the top of the column, replacing the generic "UD#" already listed. Please let us know if you would like your UDF Field Type to be changed from the default "Any Text" to one of the following: Date, List of Values, Number, True/False, or Yes/No.

DO1: **Important Information -** These notes will be imported to the Important Information section on each contact's Overview page. The type of information you track here is up to you, as it is a freeform field, and is completely editable. Notes entered here will not have a date/time stamp, and do not meet compliance standards for Client Notes that require that information.

** For a detailed comparison between Keywords & UDF's, you may go to this link:*
http://help.redtailtechnology.com/hc/en-us/articles/203977600-Keywords-and-User-Defined-Fields

** For more information regarding how Tag Groups are used, please use this link:*
https://help.redtailtechnology.com/hc/en-us/articles/203979270-How-do-I-set-up-Tag-Groups-in-Redtail-