

Google

Contacts

My Contacts

+ My Contacts (10)

The Ultimate Guide to Cleaner Contacts with Google Contacts

Why you should use Google Contacts at least once

Working With CSV Files

No CSV File Is Identical

Wherever you usually store your contacts, you can export them as a CSV file and upload them to Google Contacts.

I know CSV files can be annoying however when you realise that CSV files are not identical it becomes easier.

Each piece of software uses different field names in a different order. You can see what I mean when you compare CSV templates for Google Contacts to Contactually CRM (see below).

It's these differences that mess with your data. However, with a bit of cut and paste you will ensure you always upload apples to apples and pears to pears.

For example, if you want to get your data from Office/Google to Contactually you would do the following:

Office 365



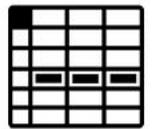
Export Data in CSV file



Download CSV Template



Copy your exported data into your downloaded Template



Upload your CSV file

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	First Name	Last Name	Email 1	Email 2	Email 3	Email 4	Company	Title	Notes	Bucket	Mobile Phone 1	Mobile Phone 2	Home Phone 1	Home Phone 2
2														
31														

Contactually Contacts CSV Templ

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	First Name	Middle Name	Last Name	Title	Suffix	Initials	Web Page	Gender	Birthday	Anniversary	Location	Language	Internet Free Busy	Note
2														

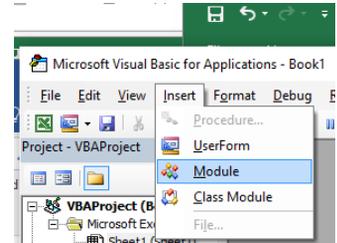
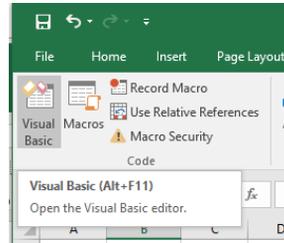
Google Contacts CSV Template

Working With CSV Files

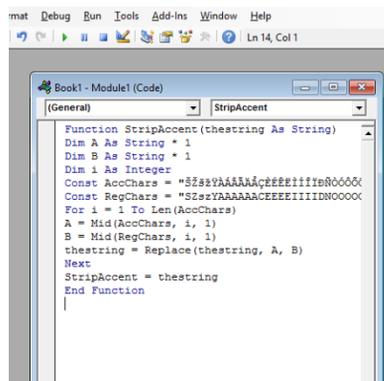
Not all text is Equal – What about accented characters?

Accented characters will wreak havoc with your data so it's best to get rid of them while you're working on your CSV file. You can do this really simply using VBA:

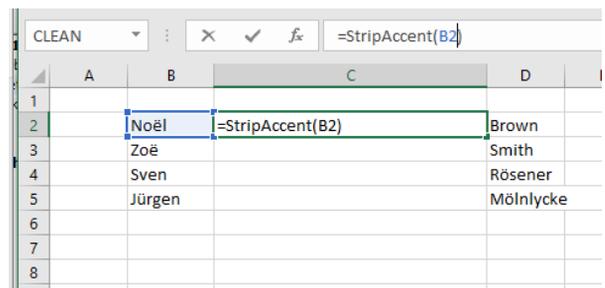
1. Select the **Developer Tab**
2. Select **Visual Basic**
3. Click on **Insert** and select **Module**
4. Within the window that opens, paste the following (you can also find this script at <http://pastebin.com/jMQbym79>)



```
Function StripAccent(thestring As String)
Dim A As String * 1
Dim B As String * 1
Dim i As Integer
Const AccChars =
"ŠšŽžÿÀÁÂÃÄÅÇÈÉÊËÌÍÎÏÐÑÒÓÔÕÖÙÚÛÜÝà
áâãäåçèéëìíîïðñóôõöùúûüý"
Const RegChars =
"ŠšžžÿÀÁÁÁÁÁÇÈÈÈÈÈÌÍÍÍÍÍÐÑÒÓÓÓÓÓÙÚÚÚÚÚ
áááááçèèèèèìíííííðñóóóóóóôúúúúúý"
For i = 1 To Len(AccChars)
A = Mid(AccChars, i, 1)
B = Mid(RegChars, i, 1)
thestring = Replace(thestring, A, B)
Next
StripAccent = thestring
End Function
```



5. Return to your spreadsheet and insert a column to the right of the column that contains your accented characters.
6. In the first row of your newly inserted column type the formula =StripAccent(insert first cell number here) and then drag the formula the length of your column. All your accented characters will be replaced.
7. Copy your non accented column and Paste Values into your original column. Delete the columns you added.



Your data will now upload without the errors that accented characters cause.

Google Contacts

Before you Upload your CSV File to Google Contacts

It's worth adding labels/tags to segment your contacts before you upload them. It's easier and less daunting to do this on a spreadsheet and, you have the added satisfaction that once you upload the CSV file you've already done the hard work!

As with all software, Google is very specific about the fields it uses and the format you need to use to input data. Here is the format for adding your contacts to specific groups.

Note, ALWAYS add EVERY contact to My Contacts.

Make sure you've added all the data to the correct fields and you're all set to upload.

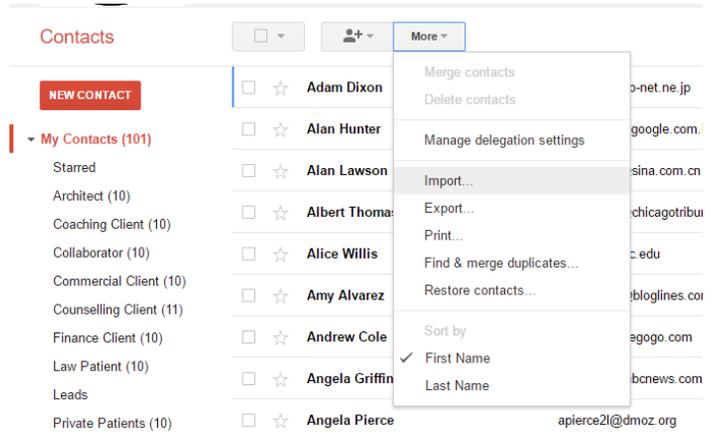
Note: You can usually download a CSV template for the software you're going to be using, but if you're not sure, just get in touch and we'll advise you.

AA
Group Membership
* My Contacts ::: Counselling Client
* My Contacts ::: Finance Client
* My Contacts ::: Collaborator
* My Contacts ::: Coaching Client
* My Contacts ::: Finance Client
* My Contacts ::: Commercial Client
* My Contacts ::: Counselling Client
* My Contacts ::: Supplier
* My Contacts ::: Residential Client
* My Contacts ::: Coaching Client
* My Contacts ::: Commercial Client
* My Contacts ::: Supplier
* My Contacts ::: Coaching Client
* My Contacts ::: Architects
* My Contacts ::: Law Clients
* My Contacts ::: Commercial Client
* My Contacts ::: Supplier
* My Contacts ::: Law Clients
* My Contacts ::: Coaching Client
* My Contacts ::: Finance Client
* My Contacts ::: Commercial Client
* My Contacts ::: Commercial Client
* My Contacts ::: Counselling Client
* My Contacts ::: Supplier
* My Contacts ::: Architects
* My Contacts ::: Law Clients
* My Contacts ::: Supplier
* My Contacts ::: Collaborator
* My Contacts ::: Law Clients
* My Contacts ::: Finance Client

Google Contacts

Uploading your CSV File

1. Click **More**
2. Select **Import**
3. Choose your CSV File and **upload**



4. Once the file has uploaded you will see the number in brackets next to **My Contacts** will have increased.

You will also see an additional Group with the date of your upload.

Finally, in your CSV file, if you labelled your contacts according to your Google Groups, your contacts will automatically be added to those groups which means all you have to do is delete the Imported Group.

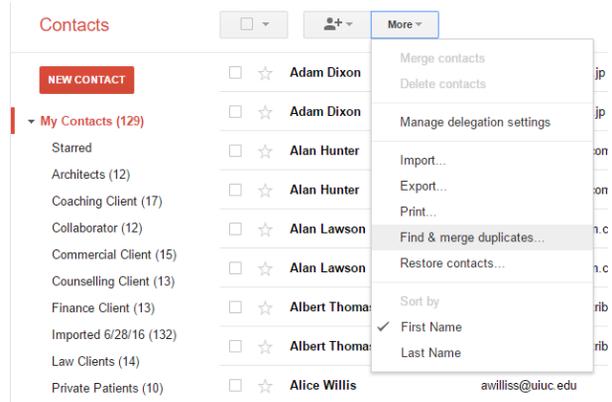


Google Contacts

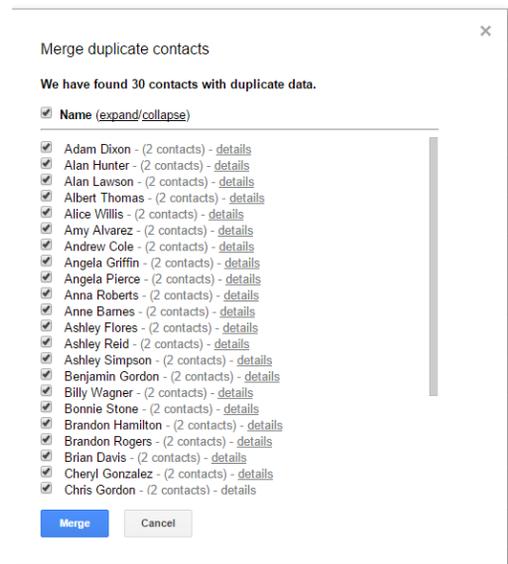
Find and Merge Duplicates

Now for the whole reason we're using Google Contacts!

1. Click on **More** and Select Find and Merge Duplicates.



2. Google will highlight any duplicates so that you can review them. Once reviewed Click **Merge**



Google Contacts

Adding Labels

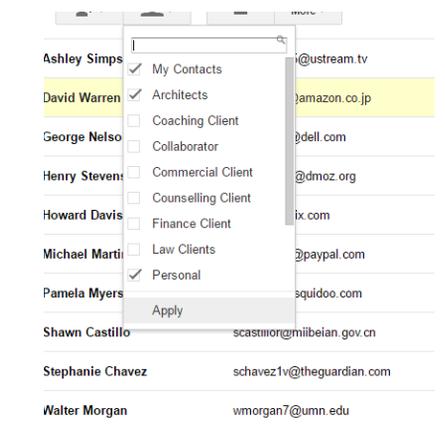
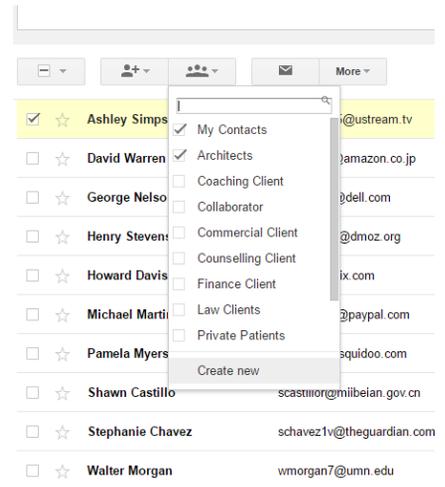
If you didn't add labels in the CSV file you can do so now.

1. Select a contact. Once selected the menu bar will expand to include the groups icon (three heads and a body).
2. Click on **the groups icon** and select the group/s that you'd like the contact to belong to. Ensure that each contact is ALWAYS a member of MY CONTACTS.
3. Deselect the contact from unnecessary groups. For example imported contacts are automatically given a label with the Imported date.

4. If you need to create a new group Click **Create New**. Type the name of the group and Click **OK**

You can bulk select contacts and add them to groups in exactly the same way.

5. Once you've finished allocating a contact/s to your groups, Click Apply.



Your contacts are now ready to export and format for upload to your CRM or email marketing software. Or you can ask us about setting up a two way continuous sync between your contacts and your CRM or email marketing software so that you can Set it and Forget it.