Bringing in customers from a spreadsheet

Bring your existing customers into HQ from Excel or a CSV file, or update the ones already here.

Steps

1. Open Customers, then Add customers.
2. Choose your file (Excel or CSV), or paste the rows, and match each column to a field: name, phone, email, address.
3. Press Look at it first to see what would be added or changed, then Bring them in.
4. Changed your mind? Press Take it back.

Good to know

Nobody you bring in is texted. Each customer is texted only after they agree to it.

People already in HQ are not added twice. They are matched by phone, email, or name and address, and you can choose to update them from the sheet. An empty cell never erases anything.

https://orshihq.com/help/import-customers