

# Uploading Customer Information Using a CSV File

CSV upload allows users to import a large set of customer information to MARQ dashboard and avoid filling in customer names and contacts manually.

## Step 1

### Create your CSV file

- This can be done either in Google Sheets, in Excel, or also Numbers(Mac).
- Download [MARQ CSV template](#) file to see how to format your file.
- Copy and paste tracking numbers, customer name, emails and phone numbers in each column.

Tracking number should be in the following format:

AB12345678 ✓

AB-1234-5678 ✓

3.6326E+11 ✗

	A	B	C	D
1	Tracking Number	Customer Email	Customer Phonenumber	Customer Name
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				









MARQ CSV Template

## Step 2

### Click *Upload CSV* next to the search bar in the main dashboard

Dashboard

Search Videos Upload CSV 1-10 of 550 < >

<input type="checkbox"/>	Tracking Number*	Customer Email*	Customer Name			
<input type="checkbox"/>	 <input type="text"/>	 <input type="text"/>	<input type="text"/>	Send	Manage >	12:56 PM
<input type="checkbox"/>	 <input type="text"/>	 <input type="text"/>	<input type="text"/>	Send	Manage >	12:56 PM
<input type="checkbox"/>	 18759872358973	 <input type="text"/>	<input type="text"/>	Send	Manage >	12:56 PM
<input type="checkbox"/>	 152837587833333	 paul@gmail.com	Paul Smith	Sent	Manage >	12:56 PM

### Step 3

## Click *Choose File* to upload your CSV file

### Import data from CSV file ✕

C://Desktop/MARQ\_CSV\_template\_20200324

I understand that any current data on these tracking numbers will be overridden with the values provided in the CSV file unless a blank value is provided.

Download a [CSV template](#) containing the required file format.

### Step 4

## Check to see if there are any errors

- See the results and re-upload the corrected csv file.

### 26 Matched, 3 Failed ✕

Status	Tracking number	Reason for failure
Failed	TN112233445566	No matching video found
Failed	TN223344556677	No matching video found
Failed	TN334455667788	Already sent
Matched	TN445566778899	
Matched	TN556677889900	
Matched	TN667788990011	