

Bulk Registration of Contacts



NOTE: This page describes how to bulk register contacts that are cases. To bulk register contacts that are mobile workers, see [this page](#).

For certain projects, it makes sense to register all the participants in the system ahead of time. This can be done by uploading their information through an Excel file using the [Excel Importer](#). Create an Excel file with the following information/headers:

- **Case Name:** The name of the registered case (or some other way to quickly identify who the person is).
- **contact_phone_number:** This is the phone number of the person. The phone number should include the country code and contain no spaces and not have a + symbol. Also, be sure to define this column as a Text column in Excel, otherwise the phone number may not import correctly. For example, a US number should be 12065551234. An Indian number would be 919560187280
- **contact_phone_number_is_verified:** This should be set to 1 for every item. It specifies that the phone number for the person is correct.
- **commcare_email_address:** This is optional, but can be specified if you prefer to email your mobile workers (instead of sending a message).
- **case id:** A blank column needs to be added here. This is the ID of the item (but since these are new items, they have no ID).
- *Additional Data:* If there is other information you want to add about the person (ex. gender, age, etc.) you can also include that as additional columns in the Excel file. [sample_excel_contacts.xls](#)

An example Excel file can be found here: [sample_excel_contacts.xls](#)

Uploading Contacts

1. Go to the Data tab, then select Import Cases from Excel.

EXPORT DATA

Export Forms

Export Cases

Export SMS

Daily Saved Exports

Excel Dashboard Integrations

EDIT DATA

Reassign Cases

Import Cases from Excel

2. Select the Excel file that you want to import. Make sure that "This file has column headers" is set to True and select Next.
3. Specify the case type for the upload. This should be used by the Surveys in your application (ex. your case type is *contact*). If you haven't setup an SMS Survey, [Setup an SMS Survey](#).
4. Choose the Excel column as the Case ID and Corresponding case field as the case id column in your Excel document.

5. Make sure "Create new records if there is no matching case" is checked.

Case Type to Update/Create

Case type

Identifying Cases to Update/Create

Excel column

Corresponding case field

Create new records if there is no matching case

Key/Value Fields

This file contains matching key/value columns

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▶ Next step

6. Select Next step

7. The next page lets you map the columns in your Excel document to case properties.

a. Case Name, choose the existing "name" case property

b. For contact_phone_number, check off "Create a new property instead" and type in and contact_phone_number

c. Follow the same step for contact_phone_number_is_verified and any other case properties.

Match Excel Columns to Case Properties

Excel Field		Case Property	
<input type="text" value="Case Name"/>	<input type="checkbox"/> This field is a date	→ <input type="text" value="name"/>	<input type="checkbox"/> Create a new property instead
✘ <input type="text" value="contact_phone_number"/>	<input type="checkbox"/> This field is a date	→ <input type="text" value="contact_phone_number"/>	<input checked="" type="checkbox"/> Create a new property instead
✘ <input type="text" value="contact_phone_number_is_verif"/>	<input type="checkbox"/> This field is a date	→ <input type="text" value="contact_phone_number_is_verified"/>	<input checked="" type="checkbox"/> Create a new property instead
✘ <input type="text" value="age"/>	<input type="checkbox"/> This field is a date	→ <input type="text" value="age"/>	<input type="checkbox"/> Create a new property instead

+ Add another matching

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▶ Confirm Import

8. Select Confirm Import. This will create all the contacts in the Excel document.