

Excel Organization Tips and Tricks for Importing in HubSpot CRM

****Please save this worksheet to the desktop on your computer.**

This way, your progress will be saved correctly as you complete each section.**

A successful HubSpot CRM import starts with well-organized data outside of HubSpot. This means you'll need to set up your Excel data sheet so that it translates seamlessly into HubSpot. With these Excel tips and tricks, you can start to organize your data and have a clear picture of some things to keep in mind before importing your data.

Here's how this worksheet is broken down:

- Excel formula
- Why it will help you grow better
- How-to instructions for using the formula
- A short video for using the formula

Excel Tip One: VLOOKUP

Excel Formula: VLOOKUP

Why it helps you grow better: When organizing data outside of HubSpot, sometimes you need to merge information across different Excel files. This is common if you're putting together an Excel file for a deal import and need to pull in company information from another Excel file, such as an Excel file for a company import. Use this VLOOKUP formula to quickly pull in information from one Excel file to another.

In this example, you'll pull information from a company Excel file into a deal Excel file. In the deal Excel file, each deal has an associated company. To pull in each associated company's phone number into the corresponding deal cell in the Excel file, you'll use the VLOOKUP formula.

- Starting in the deals Excel file, create a new column called *Phone Number*. This is the column where you'll use the VLOOKUP formula.
- In your deals Excel file, select the **Associated Company** column.
- In your company Excel file, click the **Name** column and drag to the **Phone Number** column.



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- In the right sidebar menu in the *Col_index_num* field, enter the column number of the *Phone Number* field. For this example, it's the 9th column in your selection.
- In the right sidebar menu in the *Range_lookup field*, enter 0. Then click **Done**.
- The phone number of the associated company will populate in the first cell of the *Phone Number* column in your deal Excel file. Click this cell and then drag down to populate the associated company phone number for the remaining cells in the column.

Want to see how it works? Check out the video [here](#).

Excel Tip Two: Split a Cell

Excel Formula: Split a Cell

Why it helps you grow better: If you have an Excel file with your contacts' first and last names in the same column, it can be a time-consuming process to split them up manually. Use this formula to split up your data with a few easy clicks. It can also be used to replace different characters or remove unnecessary spaces from files.

When importing your contacts into HubSpot, the *First name* and *Last name* properties are separate. That means your contacts' first and last names must be in different columns in your Excel file prior to importing. If they're combined under one *Name* column, Excel has a handy way to split these names into two columns.

- In your Excel file, add an empty column next to your *Name* column if you don't have one already.
- Select your **Name** column. In the data ribbon menu, select **Text to Columns**.
- In the dialog box, select the **Delimited** radio button. Then click **Next**.
- Check the box next to the character you want to split up the name by. In this example, uncheck the **Tab** box and check **Space** box.
- Click **Finish**.



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- Rename the two columns to match the properties you'll be mapping them to in HubSpot: *First name* and *Last name*.

Want to see how it works? Check out the video [here](#).

Excel Tip Three: Remove Capitalization

Excel Formula: Add or Remove Capitalization

Why it helps you grow better: Use this formula to change your data from uppercase to lowercase and vice-versa to make sure your data matches its corresponding property value in HubSpot. This way, you'll avoid any import errors due to a mismatch in capitalization.

- In your Excel file, create an empty column beside your desired data.
- In the first cell of this empty column, type the Excel LOWER formula: =LOWER()
- Point this formula to your data by clicking into the neighboring cell in the next column.
- Data will now populate in the cell of the empty column. Click the cell and drag the formula down in the empty column.
- Copy this new column.
- In the neighboring column, right click and select **Paste Special...** to paste these new values over your original data.
- In the dialog box, select the **Values** radio button. Then click **OK**.
- Remove the additional empty column that you created.

To change all first letters of words to capitals and all others to lowercase, simply repeat the process but with the PROPER formula instead of the LOWER formula in Excel.

Want to see how it works? Check out the video [here](#).

For more Excel tips and tricks for a successful import, check out [these top 5 Excel hacks](#).

