laylah

Data Imports

Generic CSV Imports

Documentation

As of now, you can use generic imports to import contacts (both persons and organizations) as well as tasks, comments, and notes.

Guidelines

- Always start the import with a few records (10-20 samples). This approach makes it easier to adjust the format and redo the import if necessary.
- Each file must be mapped to a single entity type: person, organization, task, comment, or note.
- It is crucial that files with links between them are configured in the same Laylah import.
- Make sure that date formats are respected; otherwise, the import will fail.
- We strongly suggest that you use our Excel templates without modifying the column headings, to simplify the task.
- Don't forget to convert the template to comma-separated CSV format before importing.
- You can run imports multiple times without any risk of duplication.
- It is possible to delete a file imported into the configuration but this does not delete the data in Laylah.
- If the import configuration is deleted, all data imported by that configuration will be deleted.

We are continuously adding supported fields, so please let us know if you need anything!

Supported Entities

Persons

Column	Format	Description
id	Text	Must be unique for each row.
first_name	Text	Contact first name.
last_name	Text	Contact last name.
status	client, prospect, other	Contact status.
birthdate*	Text	Suggested format : YYYY-MM-DD.
gender	male, female	Contact gender.
file	Text	Contact file unique number.
personal_email	Text	Personal email.
work_email	Text	Work email.
personal_phone	Text	Personal phone.
work_phone	Text	Work phone.
home_address	Text	Home address.
work_address	Text	Work address.
other_address	Text	Other address.
tags	List[Text]	List of labels to assign to contact. **Values must be separated by ";"**
assignees	Text	Assignees Names for this contact. **Values must be separated by ";"**
pin	Text	This value will add a pinned note to the created contact.

Date & Datetime values: See specifications below.

Organizations

Column	Format	Description
id	Text	Must be unique for each row.
name	Text	Organization name.
legal_name	Text	Organization legal name.
description	Text	Organization description.
status	client, prospect, other	Contact status.
email	Text	Primary location email address.
phone	Text	Primary location phone number.
address	Text	Primary location physical address.
tags	List[Text]	List of labels to assign to contact. **Values must be separated by ";"**
assignees	Text	Assignees Names for this contact. **Values must be separated by ";"**
pin	Text	This value will add a pinned note to the created contact.

Tasks

Column	Format	Description
id	Text	Must be unique for each row.
summary	Text	Task summary.
description	Text (plain text only)	Task description
status	Picklist Value	Task status. **Value must match configured tasks statuses in Laylah.**
priority	Picklist Value	Task priority. **Value must match configured tasks priorities in Laylah.**
type	Picklist Value	Task type. **Value must match configured tasks types in Laylah.**
created_at	DateTime*	Task creation timestamp.
completed_at	DateTime*	Task completed timestamp.
due_at	DateTime*	Task due date timestamp.
assignees	List[Text]	Assignees Names for this task.
person_ids	List[Text]	List of ids that refer to person ids. **Files must be in the same import for the link to work. Values must be separated by ;**
organization_ids	List[Text]	List of ids that refer to organization ids. **Files must be in the same import for the link to work. Values must be separated by ;**

Date & Datetime values: See specifications below.

Comments

Column	Format	Description
id	Text	Must be unique for each row.
content	Text (plain text only)	Comment description
created_at	DateTime*	Comment creation timestamp.
updated_at	DateTime*	Comment updated timestamp.
person_id	Text	Link to a person. **Files must be in the same import for the link to work.**
organization_id	Text	Link to an organization.. **Files must be in the same import for the link to work.**

Notes

Column	Format	Description
id	Text	Must be unique for each row.
content	Text (plain text only)	Note description
created_at	DateTime*	Note creation timestamp.
person_id	Text	Link to a person. **Files must be in the same import for the link to work.**
organization_id	Text	Link to an organization.. **Files must be in the same import for the link to work.**

Date & Datetime values: See specifications below.

Datetime formats

Format	Description
2006-01-02T15:04:05Z07:00	RFC3339 Exemples : "2025-12-25T16:32:59-05:00" (UTC-5, omit the Z) "2025-12-25T16:32:59Z" (UTC, include the Z and omit the rest)
2006-01-02T15:04:05.999999999Z07:00	RFC3339 with nanoseconds
02 Jan 06 15:04 MST	RFC822
02 Jan 06 15:04 -0700	RFC822 with timezone
Monday, 02-Jan-06 15:04:05 MST	RFC850
Mon, 02 Jan 2006 15:04:05 MST	RFC1123
Mon, 02 Jan 2006 15:04:05 -0700	RFC1123 with timezone, **will be interpreted in UTC.**

02 refers to the day, 01 refers to the month & 06 refers to the year in the samples above.

Date formats

Format	Description
2006-01-02	-
2006/01/02	-
02/01/2006	-
02 Jan 06	-
02 Jan 2006	-
02 January 06	-
02 January 2006	-
2006-01-02T15:04:05Z07:00	RFC3339 **(time value will be ignored)**
2006-01-02T15:04:05.999999999Z07:00	RFC3339 with nanoseconds **(time value will be ignored)**
02 Jan 06 15:04 MST	RFC822 **(time value will be ignored)**
02 Jan 06 15:04 -0700	RFC822 with timezone **(time value will be ignored)**
Monday, 02-Jan-06 15:04:05 MST	RFC850 **(time value will be ignored)**
Mon, 02 Jan 2006 15:04:05 MST	RFC1123 **(time value will be ignored)**
Mon, 02 Jan 2006 15:04:05 -0700	RFC1123 with timezone **(time value will be ignored)**

02 refers to the day, 01 refers to the month & 06 refers to the year in the samples above.