

Import records from Excel or CSV

Upload an existing register, including parents and baptism, check how the columns are matched and import the valid rows, skipping duplicates.

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Before you begin

- ✓ You need the Manage records permission.
- ✓ Prepare an Excel (.xlsx) or CSV file with a header row and at most 500 rows.
- ✓ If the file contains addresses, switch on the Residenza section in the record fields first.

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Open import

Open **People** → **Records** and select **Import**. **Import from Excel or CSV** opens.

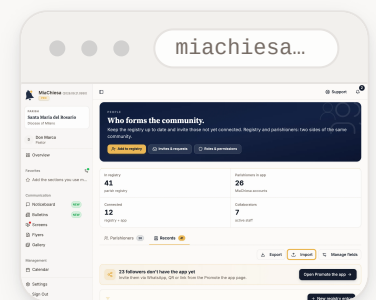


Fig. 1 Import sits in the records list toolbar.

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Prepare and upload the file

You can upload the register you already have, with its own columns: for example COGNOME E NOME, DATA N, TELEFONO, COGN PADRE, NOME PADRE, COGNOME MADRE, NOME MADRE, BATT A, BATT IL. If you start from scratch, use **Download CSV template**: it has the columns of the active fields, with an asterisk on the required ones. Then drop the file on the area or select it to choose it.

Dates can be DD/MM/YYYY or YYYY-MM-DD. Only the first sheet of an Excel file is read.

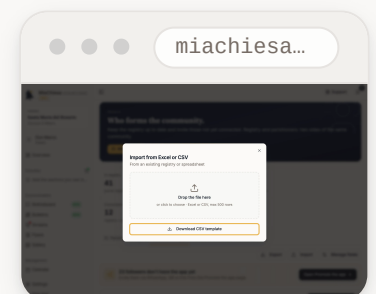


Fig. 2 The template already has the right headers.

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Check the matches

MiaChiesa recognises the file's columns and matches them to registry fields; check each match and fix the wrong ones. A column you don't need stays on **Do not import this column**.

The **Parents, baptism and combined columns** group offers **Surname and first name (single column)**, **Father's surname**, **Father's first name**, **Mother's surname**, **Mother's first name**, **Baptism — parish** and **Baptism — date**. For a column with surname and first name together choose **Surname first** or **First name first** and check the "Surname:" and "First name:" preview: the column is split at the first space.

Required fields have an asterisk, for example "Telefono *": while one has no column, "No column matched for the required fields: ..." appears and **Continue** stays disabled. If you uploaded the wrong file use **Choose another file**.

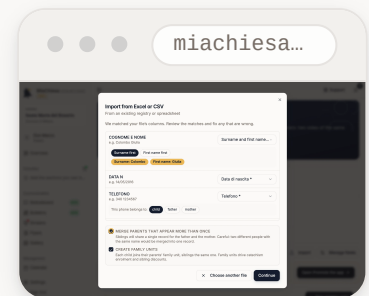


Fig. 3 Review contact ownership and both parent and family-unit options before continuing.

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Parents, siblings and baptism

When you match parent columns, **Merge parents that appear more than once** and **Create family units** appear, both on by default. Siblings with the same parents share their parent records and family unit. Merging compares names even with existing records: switch it off if different parents share a name.

Each parent with a first name and surname becomes a record linked under the child's **Kinship → Parents**. If either name is missing, check the row error before import. With **Create family units** on, the child joins the parents' family unit, also used for catechism enrolment and sibling discounts.

For a **Phone** or **Email** column, choose whether the contact belongs to the child, father or mother. A parent's phone is also saved on a child who has no number of their own; a parent's email stays on the parent's record. Matching **Baptism — parish** or **Baptism — date** records the child's baptism under **Sacraments**.

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STEP 5 OF 5 · 1 MIN

Review and import

The summary separates **Importable**, **Duplicates** and **With errors**. Duplicates include tax codes already on file and possible duplicates with the same name and date of birth in the registry or an earlier row. **Import the possible duplicates anyway** is off: leave it off unless you have verified they are different people. Also review the projected parent records, baptisms and row errors.

Select **Import N rows** to import eligible rows. **Import completed** lists records created, parents linked, family units created, baptisms, duplicates skipped and errors. If there are errors, use **Download rows with errors** to fix and re-import only those rows.

Review possible duplicates even when a tax code is absent; do not re-import the whole file after a correction.

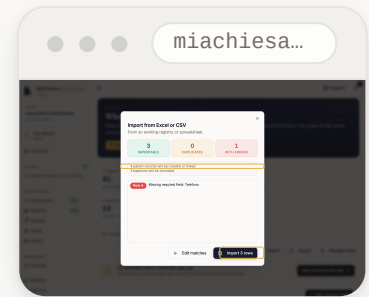


Fig. 4 The row without a phone is excluded; review projected parent records and baptisms.

What you have achieved

- ✓ New people appear in the registry with linked parents and baptism where present in the file; with the option on, relatives share a family unit.
- ✓ Duplicate and invalid rows are excluded according to your review choices; you can download and correct errors.

Troubleshooting

I see "The file must be a .xlsx or .csv"



Save the file as Excel (.xlsx) or CSV and try again.

Continue stays disabled



A required field has no matched column: the message says which. Add the column to the file or match it.

Rows without a phone are skipped (required Telefono)

If Phone is required, match a valid column. If the number belongs to a parent, assign it to them in mapping: it also fills the child's phone when the child has no number of their own.

The address is not imported

Address columns stay on Do not import this column while the Residenza section is switched off. Switch it on in the record fields and upload the file again.

Why are some rows Duplicates?

Check whether the tax code is already present, or the name and date of birth match another record or earlier row. For possible duplicates, choose **Import the possible duplicates anyway** only after review; tax-code matches remain excluded.

I see "Invalid value in field: battesimo_data"

The baptism date is not DD/MM/YYYY or YYYY-MM-DD, or does not exist. Fix it: the row is skipped while it is wrong.

I see "The file contains more than 500 rows."

Split the file into smaller parts and import them one at a time.