Importing Tasks from Spreadsheets into Cerebro

Part 1: Importing Regular Tasks

Why Use Imports

Importing tasks from a spreadsheet is a great way to quickly add many tasks at once. It saves time and helps you stay organized from the start.

How to Prepare the Spreadsheet

Make sure your spreadsheet has the following columns:
Task Name, Start Date, Due Date, Assignee, Tags, Notes

Where to Import Tasks

Go to your workspace and click the import button in the top right corner.
Choose "Import from Spreadsheet" from the menu.

How to Upload Your Sheet

Drag and drop your file into the upload area, or click to browse.

How to Create Fields

Cerebro will automatically recognize common fields like Task Name, Start Date, Due Date, Assignee, Tags, and Notes.
Any other columns will be imported as custom fields.

How to Match Columns

Cerebro will try to match your columns automatically.
If it doesn't, you can manually map each column to the right field.

How to Check the Data

Review the preview before finalizing the import.
Cerebro will show you how many tasks will be created and highlight any issues.

What to Do with Errors

If some rows have errors, Cerebro will skip them and let you know.
You can fix the errors in your spreadsheet and import again later.

How to Add Attachments

Cerebro can import files and links from your spreadsheet.
Make sure the file paths or URLs are correct and accessible.
Attachments will be added to the tasks after import.

How to Assign Users

Cerebro can assign tasks to users if their emails are in the spreadsheet.
Make sure the assignee emails match the users' accounts in Cerebro.

What You Get

After the import, Cerebro will create the tasks in your workspace.
You can review, edit, and organize them as usual.

Part 2: Importing Tasks with Subtasks

What to Use Instead of Subtasks

Cerebro does not support subtasks in imports. Instead, use:
- Parent tasks to group related tasks
- Tags to mark relationships
- Notes to describe dependencies

Cerebro will import all tasks as flat, independent tasks.
You can then organize them manually after the import.

How to Create an Import Template

Start from your spreadsheet or create a new one.
Add the required columns: Task Name, Start Date, Due Date, Assignee, Tags, Notes.
Fill in a few sample rows to test the import.
Save the file as .xlsx or .csv.

How to Configure Subtasks

Create a new sheet.
Name it exactly "Subtasks".
Add the required columns: Parent Task, Subtask Name, Start Date, Due Date, Assignee, Tags, Notes.
Fill in the parent task name exactly as it appears in the main sheet.
Add one row per subtask.
Save the file as .xlsx or .csv.

Tip: Keep the Parent Task column consistent — any typo will cause errors.

How to Match Subtasks

Cerebro will match subtasks to their parent tasks by the Parent Task column.
Make sure the parent task name matches exactly, including spelling and capitalization.
If a parent task is not found, the subtask will be skipped.

What You Get

After the import, Cerebro will create the parent tasks and subtasks.
You can review, edit, and organize them as usual.

What to Do with Errors

If some subtasks have errors, Cerebro will skip them and let you know.
Common errors include: missing parent task, invalid dates, or missing required fields.
You can fix the errors in your spreadsheet and import again later.

How the "Subtasks by Parent" Sheet Works

Cerebro supports a special sheet named "Subtasks by Parent".
This sheet lets you import subtasks without specifying the parent task in each row.
Instead, you group subtasks under their parent task.

Cerebro will automatically assign the subtasks to the parent task above.
Make sure the parent task name matches exactly.
Save the file as .xlsx or .csv.