

# Import contacts FAQs

## What data should I import?

Take the time to be thorough. Have an in-depth understanding of exactly what data you currently have. Typically, you only want to bring actionable data over from a previous system. Any data that is not actionable now or in the foreseeable future should be scrutinized. If the data does not provide value to your organization, don't import it. The more data you bring over, the more complex the migration will become.

**Note:** Importing contacts will not change the email status of previously opted-out contacts. Meaning, if my customer Tom unsubscribed and his email was imported again, it would remain opted-out.

## Clean up your source data

Make sure to spend time preparing your data for the migration. [Following this guide](#) will help you avoid common mistakes. If you have data spread across multiple spreadsheets, you will likely need to use functions like Microsoft Excel's [VLOOKUP](#) and/or [Text To Columns](#) to format your data accurately in excel. If these functions seem overwhelming, it may be a good time to turn this over to experts.

## How do I build the structure in Infusionsoft? (Tags vs. Custom Fields)

When your deciding on what method to use to segment data, first ask yourself how you plan on searching for the data and what type of reports would you like to create.

- **Tags** are labels that you can apply to contact records in Infusionsoft. Tags are visible when looking at the contact record. Tags are used as filters in search queries. Many different types of reports allow you to filter by tag. Tags are the most commonly used way to segment data in Infusionsoft. For example, you could search for everyone in your database that has tag x, but does not have Tags y and z.
- **Custom fields** allow a ton of flexibility. You can create many different types of

custom fields and merge custom field data into emails to personalize them. If you want to store data in custom fields, take a look at all of the [available field types](#) and decide which field type a particular piece of data should use. The best way to determine what type of field to use is to think about **how you want to search for that data when you build a report**. For example, if you are importing a date, you wouldn't want to import dates into text fields or as individual tags; you would want to import them into date fields so you can perform searches based on date ranges. You can add up to 100 custom fields in Infusionsoft. It's fine to build custom fields and import some sample data to see if it meets your needs. You can always delete custom fields and rollback imports. Take the time to test things out to find the optimal way to store your data.

## Quality check your data

Search through your data and evaluate the results. If you've made a mistake, or just aren't happy with the results, you can always rollback your imports and rebuild your custom fields and tags. Taking the time to do this right will give you the power to effectively and efficiently slice and dice your data when that time comes.

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