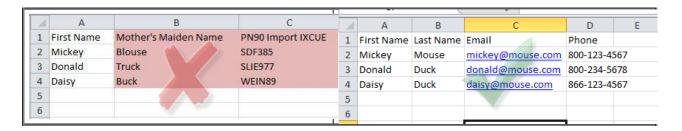
Prepare your CSV import file &

After you export data from your current system(s), you should take time to clean it up before importing it into Infusionsoft. Data must be in a .CSV format; it's the only acceptable file type. Here are a few recommendations that will help your import go more smoothly.

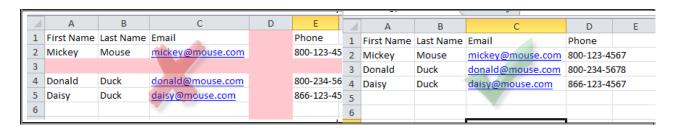
Remove any irrelevant data

Remove duplicate columns and columns that store information you won't need in Infusionsoft to segment, communicate, or produce reports.



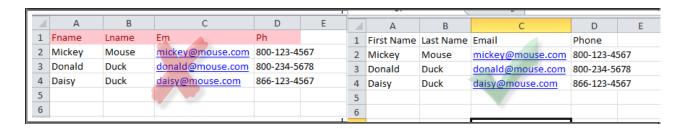
Delete empty rows and columns

Blank rows and columns will corrupt the import.



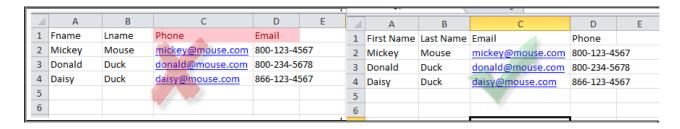
Make the column headers clear and concise

If there are any confusing or unclear headers in your data, this can cause data to be imported to the wrong areas.



Ensure the column headers accurately describe the column of data

If the headers are wrong, the data will be imported into the wrong areas.



Correctly format all dates

MM-DD-YYYY, MM/DD/YYYY, YYYY-MM-DD, and YYYY/MM/DD are all acceptable date

formats.

	Α	В	С	D	Е	1	Α	В		С	D	Е
1	First Name	Last Name	Birthday			1	First Name	Last Name	Birthday			
2	Mickey	Mouse	November 8th, 1928			2	Mickey	Mouse		11-08-1928		
3	Donald	Duck	June 9th, 1934			3	Donald	Duck	1	06-09-1934		
4	Daisy	Duck	January 9th, 1937			4	Daisy	Duck		01-09-1937		
5						5						
6			•			6						

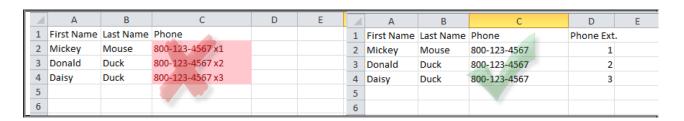
Place multiple phone numbers into separate columns

Multiple phone numbers within a single phone field will cause data to be imported improperly.



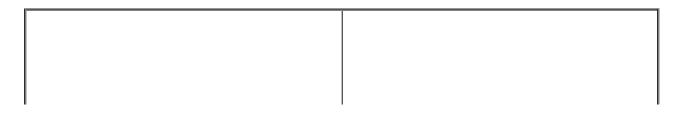
Phone extensions must be in a separate column

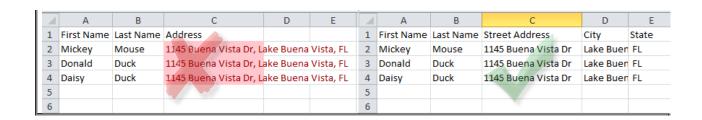
Text or an extension within a phone field will cause an improper import.



Addresses must be separated into different columns

A single field for a full address will cause data to be imported improperly.





Fully spell out country names

Abbreviations for countries will cause data to be imported improperly.



Separate multiple tags with a comma (if you want to import a column of data as a tag.)

Any column imported as a tag, without comma separation, will cause erroneous tag names.



Make sure you are not importing contacts who have opted out of your email marketing!

You will run into SPAM issues if you import people who have opted-out!

Do not try to import contact IDs as that will break the import!

