## Import your contacts %

Infusionsoft by Keap allows you to import **contacts**, **companies**, **tags**, **products**, and **subscriptions**. The most common import type is a contact import. The process for each type of import is almost identical. Before you import, make sure that your data is in csv (comma delimited) file format and that they have been properly prepared.

Click on the links below to view the sample.csv files:

- Contacts
- Contacts with Credit Cards
- Companies
- Tags
- Products
- Subscription Programs

**Pro Tip!** Need to import UTF-8 Characters? Imports with UTF-8 characters will fail if the file was created or edited using Microsoft Excel. Instead, you can paste your excel spreadsheet to a Google Sheet

- 1. Open your Excel file, select all data and copy (CTRL-C).
- 2. Open Google Sheets and paste your data into a new Sheet (CTRL-V).
- 3. Save your Google Sheet as a CSV file (top left corner in Sheets: File > Download As > Comma-separated values (.csv , current sheet)
- 4. Navigate to Infusionsoft and import the CSV file you just saved from Google

Sheets through the import tool. Be sure to not open the newly saved CSV file in Excel after saving.

1. Go to Admin > Import Data

Marketi	ing	0 * # 1 0	Q  Find a contact.		
MY NAV	CRM	MARKETING	E-COMMERCE	ADMIN	
Dashboard	Contacts	Campaign Builder	E-Commerce Setup	Branding Center	
My Day	Companies	Email & Broadcasts	Orders	Billing & Account Info	
Tasks Opportunities		Lead Generation	Products	Users	
	Referral Partners	Templates	Actions	Import Data	
	Visitors	Legacy	Promotions	Data Cleanup	
			Legacy	Stealth	
Edit	Reports Settings	Reports Settings	Reports Settings	Reports Settings	

2. Or **CRM > Contacts** and then select **Import Contacts** from the Contacts menu.

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	View Contacts						
ard - May 15, 2	Add a Contact Add a Note						
	Import Contacts	շետ					
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Status	Name		Count	Process	3		

3. Select **Contacts** and click **Go**.

🛃 Import stuff into Infusionsoft
Pick what you wanna import and click Go.
Contacts 💽 🚱
Or, use one of our import tools for: AWeber™
Constant Contact™
iContactm

4. Click on **Browse** to select a csv file from your computer.

Water a video about importing contacto
Download a sample .csv file for importing contacts
Now, upload a .csv file with the contacts you wanna import:
people-sample.csv Browse
Back

5. Click on **Next** to start the import wizard.

Now, upload a .csv	file with the contacts you wanı	na iı
people-sample.csv	Browse	
Back		
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6. Match the fields. The field name from your spreadsheet is on the left column. The Infusionsoft field name is on the right. Select the matching Infusionsoft field from each drop-down. If a matching field is not listed, you can create a custom field or

select Do not Import this field to omit the field from the import.



(Optional) Match field values for the multi-choice fields (e.g. drop-downs or select lists). Select a matching Infusionsoft field from each drop down. If you need to populate multiple Infusionsoft fields with data from one spreadsheet, click on the Additional Field Matching Options link at the bottom of the page.

ZipFour2	•	Zip Four (Shipping)	
Country2	•	Country (Shipping)	•
Additional field ma	atching (	options	
	ZipFour2 Country2 Additional field ma Back Nex	ZipFour2	ZipFour2 Country2 Country (Shipping) Additional field matching options Back Next

7. Click **Next** when you have finished mapping your fields.

Country2	→ 	Country (Shipping)		
Additional field n	natching	options		
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8. Confirm Explicit Permission to send email. Read through the permission guidelines and choose *Yes* or *No*.

-   Admin 🔶 🛧 # 1. 0 Q -	Find a contact
Branding Center Billing & Account Info Users v Import Data Data Cleanup Stealth v	Reports ~ Settings
Preparing for Email Marketing Do you have permission to send marketing emails to these contacts?	Import Contacts
• Yes No	Jupload Your File
Because you've obtained permission to market to these contacts, you may import them and send	Match Fields
them marketing emails.	🗸 Match Field Values
See our Email Deliverability Handbook for more details.	Email Marketing
	Review the Import
Back Next	

**No** - These contacts will be imported with the email status of Non-Marketable which means you will still be able to send them individual emails. You will not however be able to use these contacts in Email Broadcasts or Campaigns. Read more on Email Status

**Yes** - When you select Yes, you are agreeing to the Infusionsoft Acceptable Use Policy and are required to answer a series of questions regarding how you obtained the list you are importing. This information will be reviewed by our compliance team.

9. Click **Next** after you have successfully answered the questions. If some information is missing or incomplete, you will be alerted to provide more information.

Country2	Country (Shipping)		
Additional field match	ing options		
Back			
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10. Review your import. Click on **Previous** or **Next** to scroll through a few of the records to verify you matched the fields properly.



11. (Optional) If you make a mistake, click the link to make changes to the field mapping before proceeding.



12. **Pro Tip!** You can mark the checkbox to create or add contacts to an existing company record that has a company name in the company field. Every contact that belongs to the same company will be grouped together in the same company record. **Please Note** that any **spelling variation** in a company name will create multiple companies records. For example, **Infusionsoft** and **Infusionsoft Software** would create two separate companies.



- 13. Click on **Done** to begin the import
- 14. (Optional) Upon completing the Import, you have the option to view the list you imported, send them a broadcast , and/or save the import settings. When you save the Import settings, the system will store the field matches and the actions you assigned to the import (see #9). Using a saved import allows you to skip some import steps when you import the same kind of list in the future.