

Mass update contacts with a spreadsheet CSV File

You can use the Infusionsoft Modify Existing Records Import tool to mass update a specific list of contacts. This mass update option allows you to update a group of existing contacts. For example, you may need to add country information to all of your existing contacts. You can export a list, add each person's country information to it, and then import it back into Infusionsoft to update your existing contact list. The Contact ID field must be included in the export and the updated import file.

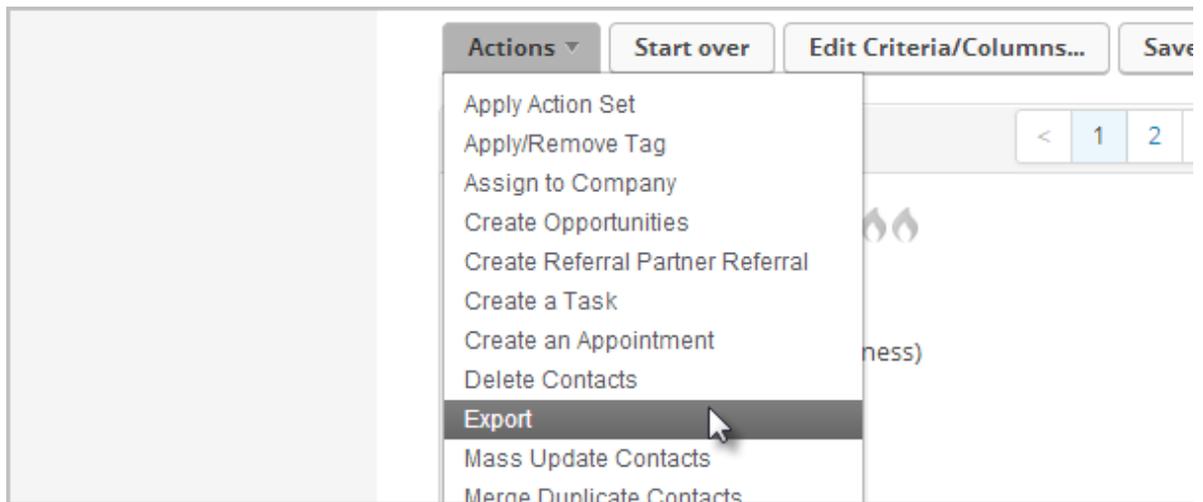
Warning! The new information will permanently overwrite existing information in the updated field(s). The only exception is the Contact Notes field; this field can only be appended to. Updates performed through the Import tool cannot be reversed. Make sure you preview the field matching before you complete the import.

Part 1 - Find a List of Contacts

1. Go to **CRM > Contacts** in the main navigation menu.
2. Select a saved search from the drop-down or click on **Start Over** to enter new search criteria and then click the **Search** button.
3. Verify you have the correct list.

Part 2 - Export the List

1. Click on the **Actions** button and select **Export**



2. Choose the fields to export. All of the fields are selected by default. Click on the top check box to clear the selections. Mark the boxes next to the fields you want to include in the export. **You MUST include the Id field.**

2) Choose fields to export

<input checked="" type="checkbox"/>	Title	Description
<input checked="" type="checkbox"/>	Id	Infusionsoft Contac
<input type="checkbox"/>	Name	
<input checked="" type="checkbox"/>	First Name	
<input checked="" type="checkbox"/>	Last Name	

3. Save the file to your computer.

Part 3 - Add or Change Data

1. Open the csv file to change or add fields. You can add fields by inserting a new column on the spreadsheet. Make sure you add a descriptive header to the top of the column.
2. Remove unnecessary columns from the spreadsheet. Only import the Infusionsoft ID column and columns that contain updated information.
3. Save the revised file.

Part 4 - Import The Updated List

1. Go to Admin > Data Cleanup in the main navigation menu
2. Click on Modify Existing Records. Select the data type and click on Go
3. Click on Browse to find the revised csv file on your computer, and then click Next
4. Match the Fields. The ID Field must match with the Infusionsoft ID Field

 = Field not matched yet. Find a match or [create custom fields for all unmatched fields...](#)
 = You chose not to update the field.

 Your Fields	→	 Infusionsoft Fields	field matching tips
ID		Infusionsoft's Contact Id	<input type="text"/>
ProductName		No match, pick an Infusionsoft field	<input type="text"/>
Sku		No match, pick an Infusionsoft field	<input type="text"/>
ProductShortDesc		No match, pick an Infusionsoft field	<input type="text"/>

5. Follow the import wizard instructions to complete the process
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