Update Contacts with a CSV %

You can use the Infusionsoft Import tool to mass update a specific list of contacts. For example, you may need to add different 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 Infusionsoft Contact ID 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. This will not delete/remove tags.

Important things to know

- You can <u>NOT</u> use a Modify Existing Records to delete information. Empty fields will be skipped
- Never match fields to the "Your Systems Contact ID"



Instructions

- 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.

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- Infusionsoft Contact ID: Make sure NOT to match the Infusionsoft Contact ID to the System Contact ID. This will not update any records but will only skip the import.
- Tags: Use Create tags from your fields values even if the tag already exists in your app.
- Create a Corresponding Company Record: You can mark the checkbox to create company records for every contact that has a company name in the company field. 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

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| First Name Last Name Company Tags Email Phone 1 Number Street Address 1 (Billing) | Jon Doe Infusionsoft Repeat Buyer jon.doe@infusionsoft.com 619-592-3357 1877 Carriage Court | Check to | Email Marketing Review the Import create a New Company |
| Other Import Options: Create a corresponding C Run some Actions (start a see Back Done | ompany Record for everyone with a compan quence, create tasks, etc) | To sync to the Comp exactly as New Comp | Record a existing Company record any Name must be spelled it in your app. Otherwise a aany Record will be created. |

• Run some Actions: Apply/Create multiple tags and other Actions Sets

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| Other Impo | ort Options: corresponding C ctions (start a se | <i>Company Recor</i> quence, create | d for everyor tasks, etc) | e with a compa | Use "F actions Partne "App | Run s suc er", " oly Ta | some A h as "(Create ag" to | Actions" to run Create Referral an Order", or name a few. | |