

Update Contacts with a CSV

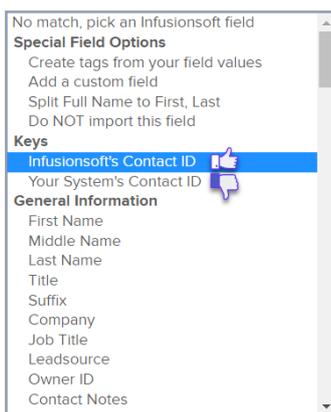
You can use the Infusionsoft Import tool to mass update a specific list of contacts. For example, you may need to add different country information to all of your existing contacts.

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

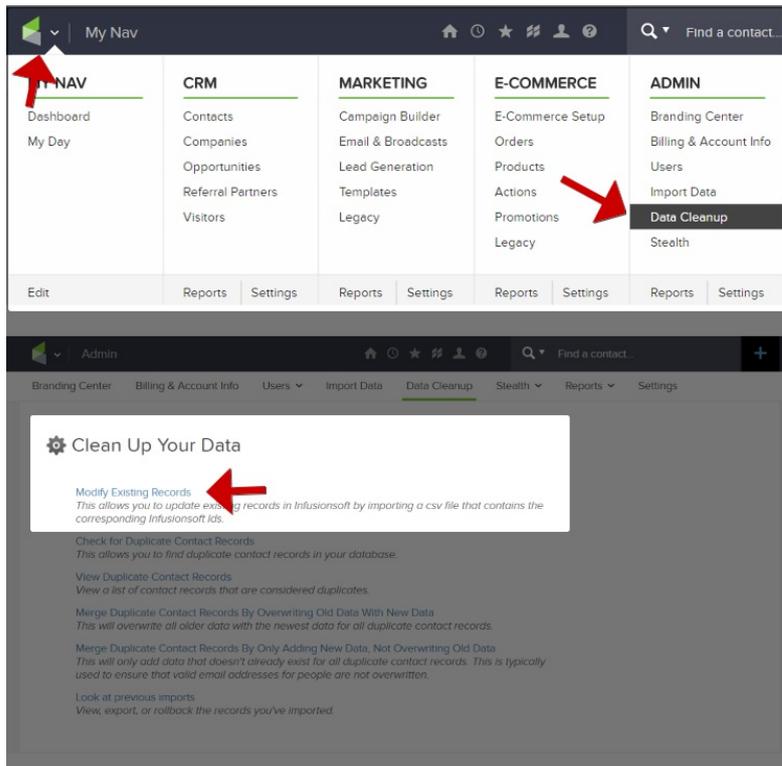
- You can NOT use a Modify Existing Records to delete information. Empty fields will be skipped
- **Never match fields to the "Your Systems Contact ID"**



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.



- **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

A final review before we import

Look at the preview below to make sure everything looks okay.

It's a good idea to review several of the records you're importing to make sure your fields are matched correctly. If you see something that looks a little off, you can click here to change how you matched your fields.

Click arrows to review the import data. Make sure it matches your file.

First Name	Jon
Last Name	Doe
Company	Infusionsoft
Tags	Repeat Buyer
Email	jon.doe@infusionsoft.com
Phone 1 Number	619-592-3957
Street Address 1 (Billing)	1877 Carriage Court

Import Contacts

- ✓ Upload Your File
- ✓ Match Fields
- N/A Match Field Values
- ✓ Email Marketing
- ➔ Review the Import

Other Import Options:

Create a corresponding *Company Record* for everyone with a company.

Run some Actions (start a sequence, create tasks, etc...)

Back Done

Check to create a New Company Record

To sync to a existing Company record the Company Name must be spelled exactly as it in your app. Otherwise a New Company Record will be created.

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

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Previewing 1 of 1

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Use "Run some Actions" to run actions such as "Create Referral Partner", "Create an Order", or "Apply Tag" to name a few.