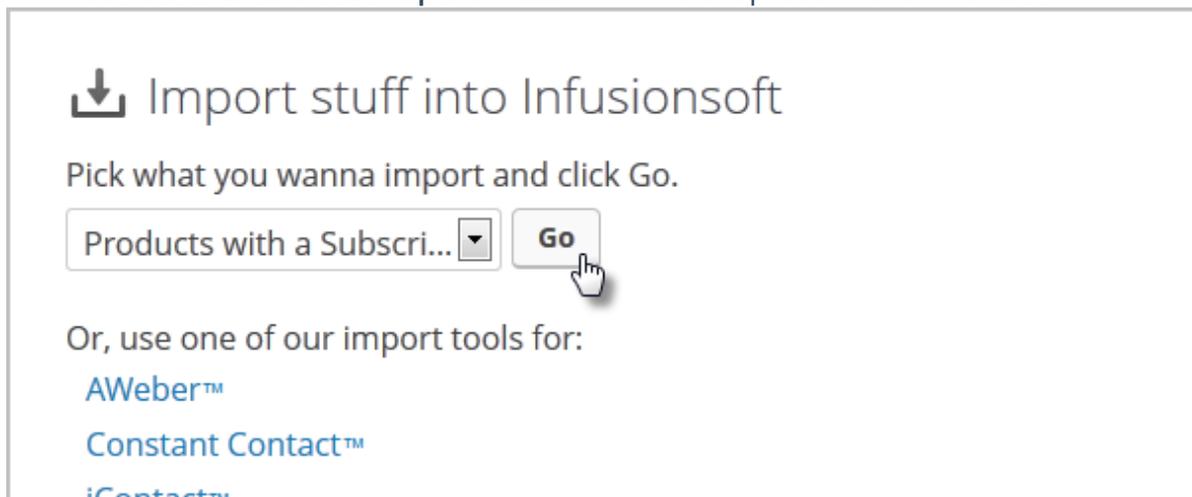


Import A List Of Subscription Products Into Infusionsoft

If you have a lot of products or subscriptions, you will want to add them through the import tool. If you are coming from another system, you should be able to export product lists and save them in .csv file format.

Note: If you sell both products and subscriptions, you will need to divide them into 2 lists and import the products separately. The subscription import includes additional fields for recurring billing. The Infusionsoft import tool will create the subscription product records with the recurring billing details. After the import, you will still need to edit the product records to add additional description, a product image, and assign the subscriptions to product categories.

1. Go to **Admin > Import Data** in the main navigation menu.
2. Select **Products with a Subscription Plan** from the drop-down and click **Go**.



3. Click on **Browse** and select the product file (in .csv format) from your computer.
4. Click **Next**
5. Match the Product Fields in your spreadsheet to the following available Infusionsoft fields.
 - o **Product Name**
 - o **Product Price**
 - o **Taxable** (Yes or No)
 - o **Charge Shipping** (Yes or No)
 - o **Status** (Active or Inactive)
 - o **Product Short Description:** This shows up on the Shopping Cart, Order Forms, and on invoices / receipts.

- (Optional) **Product Description**: This is a long description that shows up when the product is displayed in the Infusionsoft Storefront.
- (Optional) **SKU**: This is optional. It stands for Stock Keeping Unit and may correlate with an external inventory management system.
- (Optional) **Weight**: This is used to calculate weight-based shipping.
- (Optional) **Cost per Unit**: This is used to track profit margins.
- (Optional) **Hide in Store** (Yes or No): This is used to hide products from the Infusionsoft Storefront.
- (Optional) **Subscription Only** (Yes or No): This must match up with a column on your import spreadsheet that denotes whether a product is sold by subscription plan only, or not.

6. Match the Subscription Plan Fields in your spreadsheet to the following available Infusionsoft fields.

- **Frequency**: This will be a number value that, when combined with the cycle, will determine how often the customer is auto-charged for the program. (e.g. 1 per month - 1 is the frequency.)
- **Cycle**: This is a calendar value that, when combined with frequency, determines how often a customer is auto-charged for the program (e.g. 1 per month - month is the cycle.)
- **Prorate** (Yes or No): If you set this to *Yes*, the upcoming subscription autocharge amount will automatically adjust when the next bill date is changed for the subscription. This is most commonly used with service subscriptions.
- (Optional) **Number of Cycles**: This field automatically sets an end date for subscriptions with a limited duration (e.g. 1 year.) If the subscription bills once a month (frequency / cycle) and ends after one year, the number of cycles is 12.
- **Active** (Yes or No): This shows or hides the subscription option on the product record in the Infusionsoft Storefront and within the Links tab of a product record.

7. Click on the **Next** button.

8. (Optional) Match Field Values

This step will only show up if you are importing fields that have more than one possible value.

9. Click on the **Next** button.

10. Click on the **Previous** and **Next** Arrows to preview the import before the final step.

11. Click on **Done**.

