Prepare your CSV import file 🔗

After you export data from your current system(s), clean it up before importing it into Infusionsoft. Data must be in a .CSV format which is the only acceptable file type. Here are a few recommendations that will help your import go smoothly.

Remove irrelevant data

Remove duplicate columns and columns that store information that you don't need to segment, communicate, or produce reports.

Delete empty rows and columns

Blank rows and columns will corrupt the import.

	A	B	C	D	E
1	First Name	Last Name	Email		Phone
2	Mickey	Mouse	mickey@mouse.com		800-123-45
3					
4	Donald	Duck	donald@mouse.com		800-234-56
5	Daisy	Duck	daisy@mouse.com		866-123-45
6					

	A	B	C	D	E
1	First Name	Last Name	Email	Phone	
2	Mickey	Mouse	mickey@mouse.com	800-123-4567	
3	Donald	Duck	donald@mouse.com	800-234-5678	
4	Daisy	Duck	daisy@mouse.com	866-123-4567	
5					
6					

Use clear and concise column headers

If there are any confusing or unclear headers in your data, this can cause data to be imported to the wrong areas.

	A	B	C	D	E
1	Fname	Lname	Em	Ph	
2	Mickey	Mouse	mickey@mouse.com	800-123-4567	
3	Donald	Duck	donald@mouse.com	800-234-5678	
4	Daisy	Duck	daisy@mouse.com	866-123-4567	
5					
6					

	A	B	C	D	E
1	First Name	Last Name	Email	Phone	
2	Mickey	Mouse	mickey@mouse.com	800-123-4567	
3	Donald	Duck	donald@mouse.com	800-234-5678	
4	Daisy	Duck	daisy@mouse.com	866-123-4567	
5					
6					

Ensure the column headers accurately describe the column of data

If the headers are wrong, the data will be imported into the wrong areas.

	A	B	C	D	E
1	Fname	Lname	Phone	Email	
2	Mickey	Mouse	mickey@mouse.com	800-123-4567	
3	Donald	Duck	donald@mouse.com	800-234-5678	
4	Daisy	Duck	daisy@mouse.com	866-123-4567	
5					
6					

	A	B	C	D	E
1	First Name	Last Name	Email	Phone	
2	Mickey	Mouse	mickey@mouse.com	800-123-4567	
3	Donald	Duck	donald@mouse.com	800-234-5678	
4	Daisy	Duck	daisy@mouse.com	866-123-4567	
5					
6					

Correctly format all dates

MM-DD-YYYY, MM/DD/YYYY, YYYY-MM-DD, and YYYY/MM/DD are all acceptable date formats.

	A	B	C	D	E
1	First Name	Last Name	Birthday		
2	Mickey	Mouse	November 8th, 1928		
3	Donald	Duck	June 9th, 1934		
4	Daisy	Duck	January 9th, 1937		
5					
6					

	A	B	C	D	E
1	First Name	Last Name	Birthday		
2	Mickey	Mouse	11-08-1928		
3	Donald	Duck	06-09-1934		
4	Daisy	Duck	01-09-1937		
5					
6					

Place multiple phone numbers into separate columns

Multiple phone numbers within a single phone field will cause data to be imported improperly.

	A	B	C	D	E
1	First Name	Last Name	Phone		
2	Mickey	Mouse	800-123-4567, 866-800-1234		
3	Donald	Duck	800-123-4568, 866-800-1235		
4	Daisy	Duck	800-123-4569, 866-800-1236		
5					
6					

	A	B	C	D	E
1	First Name	Last Name	Phone 1	Phone 2	
2	Mickey	Mouse	800-123-4567	866-800-1234	
3	Donald	Duck	800-123-4568	866-800-1235	
4	Daisy	Duck	800-123-4569	866-800-1236	
5					
6					

Phone extensions must be in a separate column

Text or an extension within a phone field will cause an improper import.

	A	B	C	D	E
1	First Name	Last Name	Phone		
2	Mickey	Mouse	800-123-4567 x1		
3	Donald	Duck	800-123-4567 x2		
4	Daisy	Duck	800-123-4567 x3		
5					
6					

	A	B	C	D	E
1	First Name	Last Name	Phone	Phone Ext.	
2	Mickey	Mouse	800-123-4567	1	
3	Donald	Duck	800-123-4567	2	
4	Daisy	Duck	800-123-4567	3	
5					
6					

Addresses must be separated into different columns

A single field for a full address will cause data to be imported improperly.

	A	B	C	D	E
1	First Name	Last Name	Address		
2	Mickey	Mouse	1145 Buena Vista Dr, Lake Buena Vista, FL		
3	Donald	Duck	1145 Buena Vista Dr, Lake Buena Vista, FL		
4	Daisy	Duck	1145 Buena Vista Dr, Lake Buena Vista, FL		
5					
6					

	A	B	C	D	E
1	First Name	Last Name	Street Address	City	State
2	Mickey	Mouse	1145 Buena Vista Dr	Lake Buen	FL
3	Donald	Duck	1145 Buena Vista Dr	Lake Buen	FL
4	Daisy	Duck	1145 Buena Vista Dr	Lake Buen	FL
5					
6					

Spell out country names

Abbreviations for countries will cause data to be imported improperly.

	A	B	C	D	E
1	First Name	Last Name	Country		
2	Mickey	Mouse	USA		
3	Donald	Duck	USA		
4	Daisy	Duck	USA		
5					
6					

	A	B	C	D	E
1	First Name	Last Name	Country		
2	Mickey	Mouse	United States		
3	Donald	Duck	United States		
4	Daisy	Duck	United States		
5					
6					

Separate multiple tags with a comma if you want to import a column of data as a tag.

You can create new tags and apply existing tags based on values in this column.

Any column imported as a tag, without comma separation, will cause erroneous tag names.

Remove special characters from the CSV file. Here are some example special characters that may cause issues during an import.

¥ © ° ¾ √ ♥

Make sure you do not import contacts who have opted out of your email marketing!

You will run into SPAM issues if you import people who have opted-out

Do not try to import contact IDs as that will break the import.