# Mass update contacts with a spreadsheet

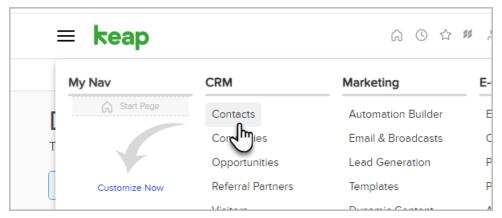
This article applies to: Max Classic

You can use the Max Classic 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 Max Classic 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

Contacts			
Actions ~ New Search Edit Criteria/C	Columns Save Print		
Q Search			
Apply Action Set			
Apply/Remove Tag			
Assign to Company	Company Name None		
Create Opportunities	Phone 1 (999) 378-7396 (Business)		
Create Referral Partner Referral			
Create a Task			
Create an Appointment	Company Name None		
Delete Contacts	Phone 1 None		
Export			
Mass Update Contacts			
Merge Duplicate Contacts			

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.

	Title	Description
<	ld	Contact Id
	Name	
<	First Name	
	Last Name	

3. Save the file to your computer.

### Part 3 - Add or Change Data

- 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 Keap ID column and columns that contain updated information.

3. Save the revised file.

## Part 4 - Import The Updated List

1. Go to **Reporting > Data Cleanup** in the main navigation menu

⑦ Q ▼ Find	d a contact	e
mmerce	Admin	Reporting
ommerce Setup	Branding Center	Reports
ers	Billing & Account Info	Data Cleanup
ducts	Users	J.
ment Setup	Import Data	-
ons		

2. Click on Modify Existing Records. Select the data type and click on Go

	Modify Existing Records This allows you to update existing records in Keap by importing a csv file that contai	Check for D This allows yo contact record database.				
	Learn about Modify Existing Records	Learn about Che Contact				
Modify existing records						
Pick what you would like to modify and click Go.						
The records in your file need to contain lds that correspond to records in Keap. If we c						
Please read this article before attempting to modify any records.						
If you're just trying to import new records, click here.						
Contac	cts ~ Go					

3. Click on Browse to find the revised csv file on your computer, and then click Next

Download a sample .csv file for updating contacts		
Now, ι	pload a .csv file with the contacts you would like to update:	
	er than 200 MB cannot be uploade	
Bac	k Next	

- 4. Match the Fields. The ID Field must match with the Keap ID Field
- 5. Follow the import wizard instructions to complete the process