

Mass update a list of contacts 🗝️

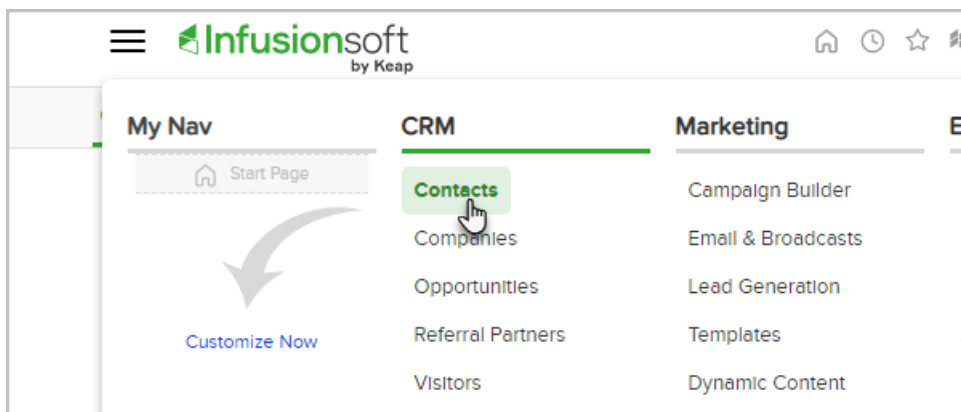
This article applies to:

There are two ways you can mass update a list of contacts in Max Classic: Using the Mass Update Contacts tool, or you can export the contacts that you want to update, make the changes yourself, then re-import the contacts back into Max Classic. This article explains both options in detail. The Mass Update Contacts tool is very easy to use, so it's suggested to start there.

Mass Update Contacts Tool

You can mass update a field for a list of contacts. This works well when you need to add a common field to all contacts on a list; e.g., all contacts need the same country or lead source id.

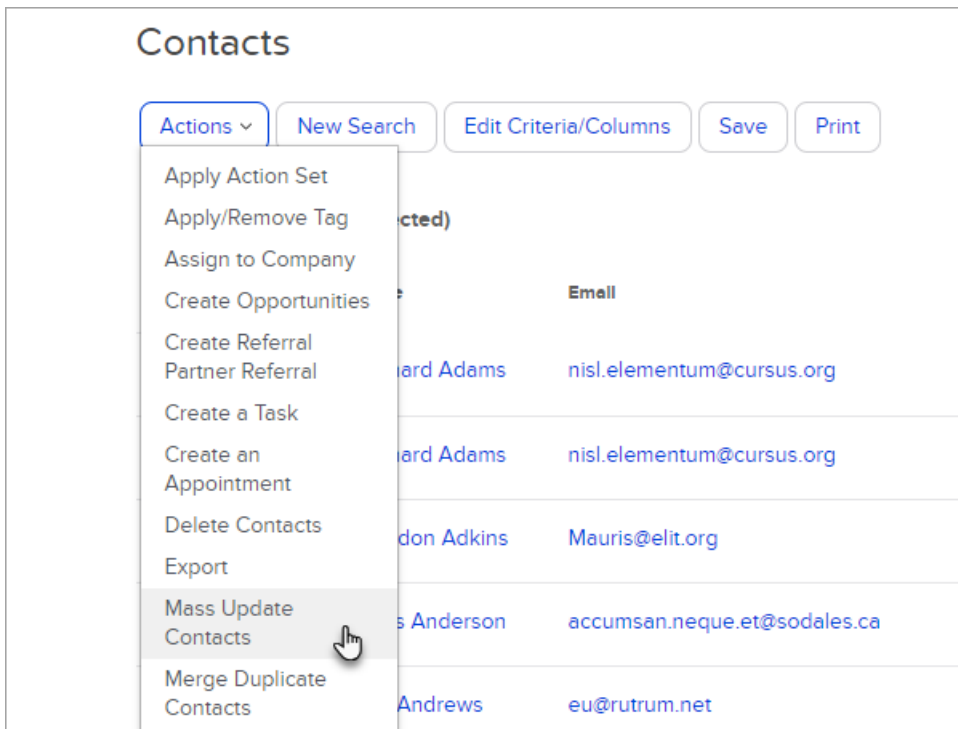
1. Navigate to CRM > **Contacts** and search for the contacts you want to update.



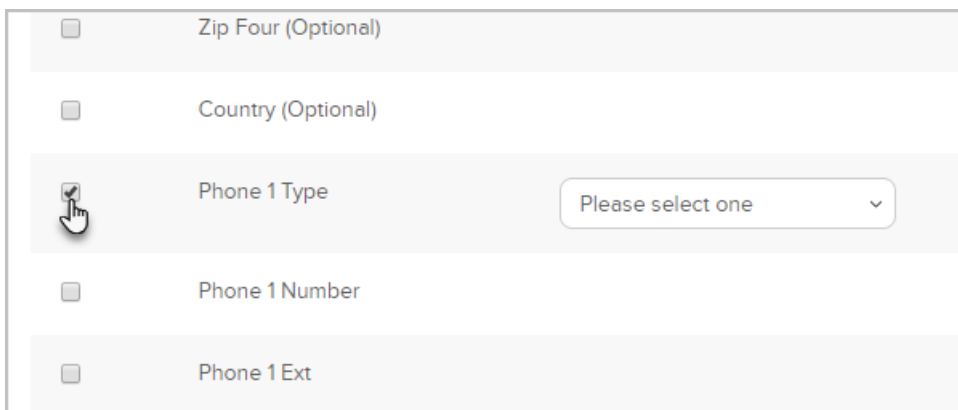
2. Select the contacts to update by selecting all or individually selecting eligible contacts.

<input checked="" type="checkbox"/>	Leonard Adams	nisl.elementum@cursus.org
<input checked="" type="checkbox"/>	Leonard Adams	nisl.elementum@cursus.org
<input checked="" type="checkbox"/>	Brandon Adkins	Mauris@elit.org
<input type="checkbox"/>	Bevis Anderson	accumsan.neque.et@sodales.ca
<input type="checkbox"/>	Neil Andrews	eu@rutrum.net

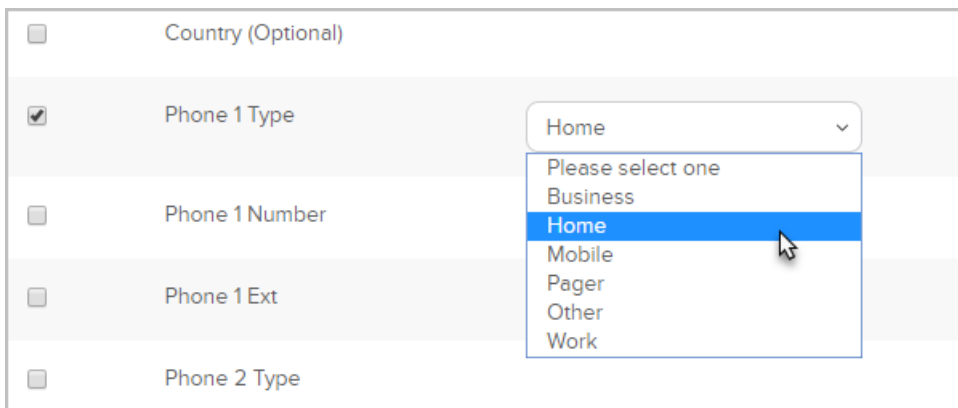
3. Once you have your list, click **Actions** and select **Mass update Contacts** form the drop-down. Note: You will only see this option if your permissions allow.



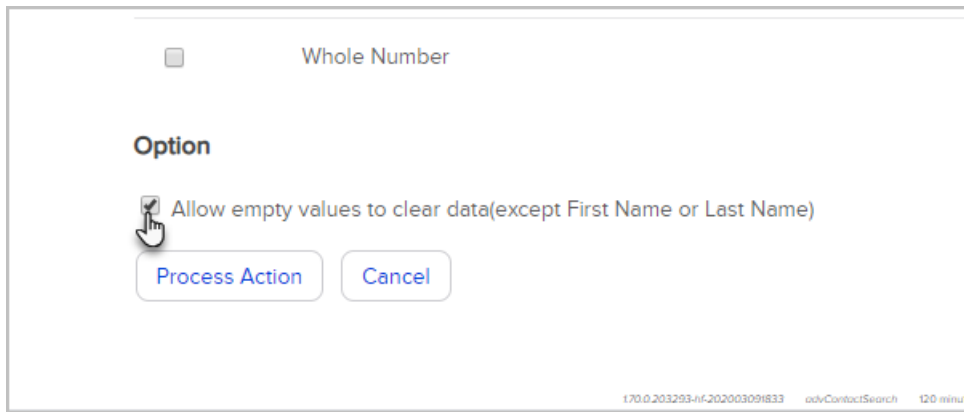
4. Choose the field(s) to update by clicking the check mark.



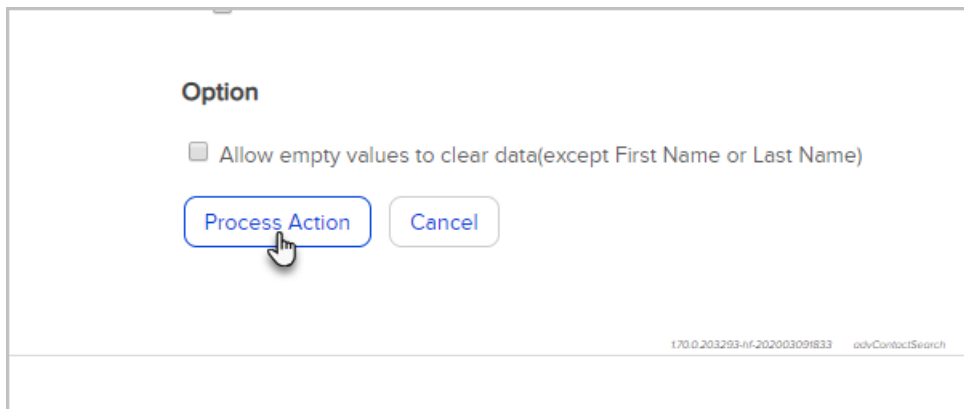
5. Choose or enter the new value



6. (Optional) If you want to clear existing data by entering an empty value, check the box.



7. Click **Process Action** to complete the update.



Pro Tip! Use this same process to update opportunities (CRM > Opportunities) or Referral Partners (CRM > Referral Partners).

Mass Update with a CSV File

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.

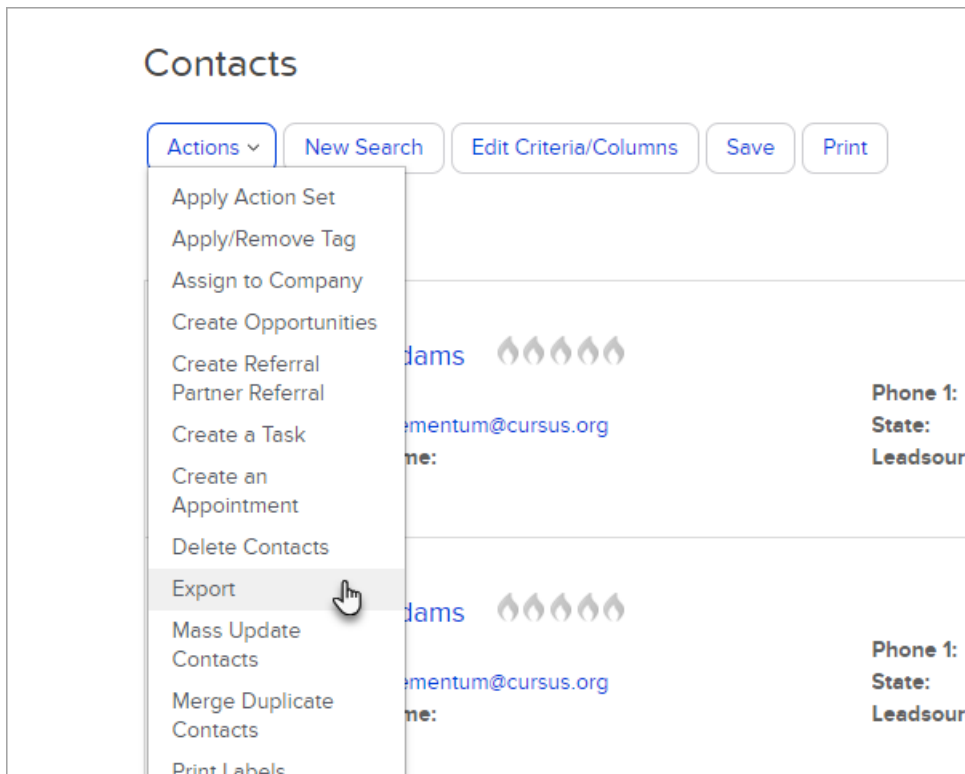
Warning! The new information will permanently overwrite existing information in the updated field(s). The only exception is the Contact Notes field; this field can only be appended to. Updates performed through the Import tool cannot be reversed. Make sure you preview the field matching before you complete the import.

Part 1 - Find a List of Contacts

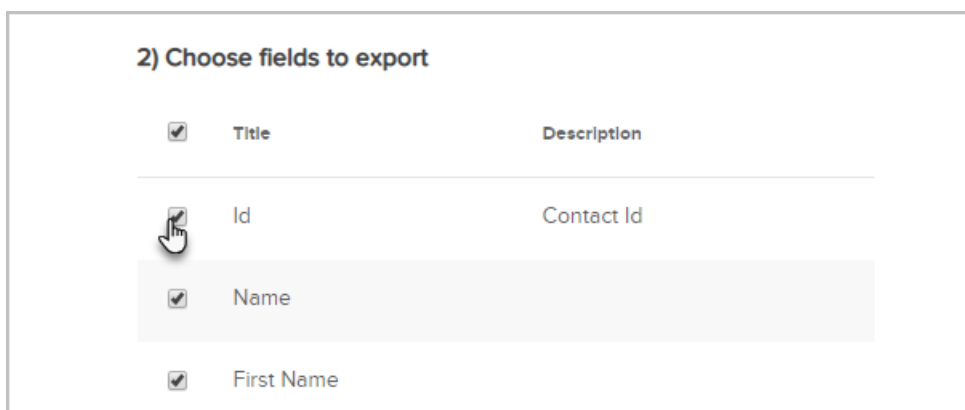
1. Go to CRM > **Contacts** in the main navigation menu.
2. Select a saved search from the drop-down or click on **Start Over** to enter new search criteria and then click the **Search** button.
3. Verify you have the correct list.

Part 2 - Export the List

1. Click on the **Actions** button and select **Export**



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.**



3. Save the file to your computer.

Part 3 - Add or Change Data

1. 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 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 Keap ID Field

The screenshot shows a field matching interface. At the top, there are two legend items: a yellow warning triangle icon followed by the text "= Field not matched yet. Find a match or [create custom fields for all unmatched fields...](#)" and a red circle with a slash icon followed by the text "= You chose not to update the field." Below the legend, there are two columns of fields. The left column is labeled "CSV Your Fields" and contains "ID", "ProductName", "Sku", and "ProductShortDesc". The right column is labeled "Infusionsoft Fields" and contains a dropdown menu for "ID" (selected as "Infusionsoft's Contact Id"), and three dropdown menus for "ProductName", "Sku", and "ProductShortDesc" (all selected as "No match, pick an Infusionsoft field"). A green arrow points from "ID" in the CSV column to the "ID" dropdown in the Infusionsoft column. A blue link "field matching tips" is located to the right of the "Infusionsoft Fields" header.

5. Follow the import wizard instructions to complete the process
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