

Importing Data

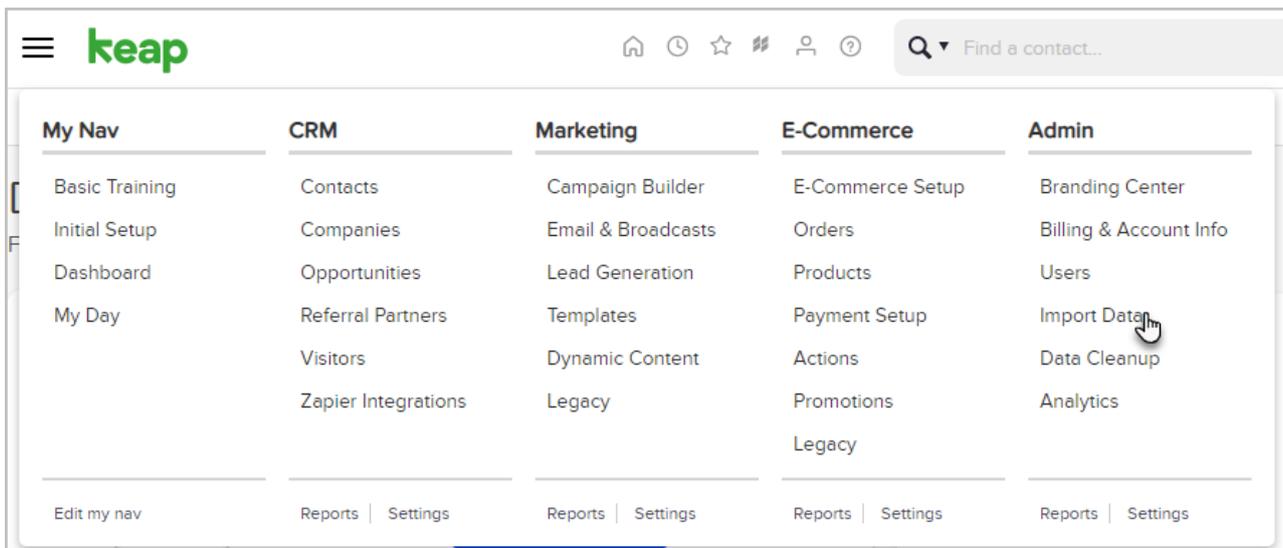
This article applies to:

From the Data Import area, you can upload your lists of contacts, companies, products and tags. You can also use this feature to [update existing contacts](#).

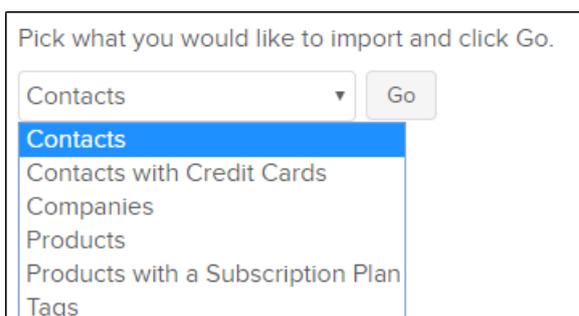
Files larger than 10 MB cannot be uploaded. In a situation where you have a file larger than 10 MB, you would need to split it into multiple files. You can use free software like [Free Huge CSV Splitter](#) to help you.

Your browser does not support HTML5 video.

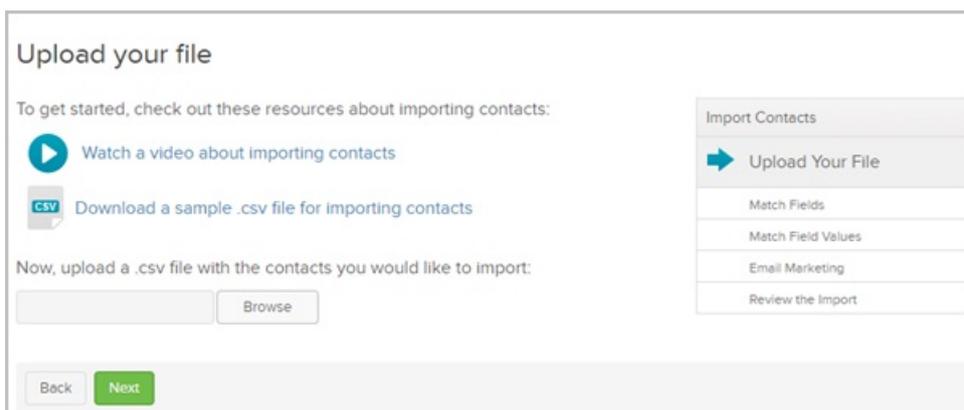
To import your data into your application:



1. Open the **Navigation menu** in the upper left hand corner of the navigation bar and click **Import Data** under the **Admin** section.
2. This opens your **Data Import** screen. On this screen, you can use a download tool for importing the data you've exported from AWeber, Constant Contact, iContact, 1Shopping Cart or Outlook. You can also click **view your previous imports** to see what you've imported in the past.
3. Click the **Contacts** drop-down to choose what type of import you are attempting.



4. Click **Go**.



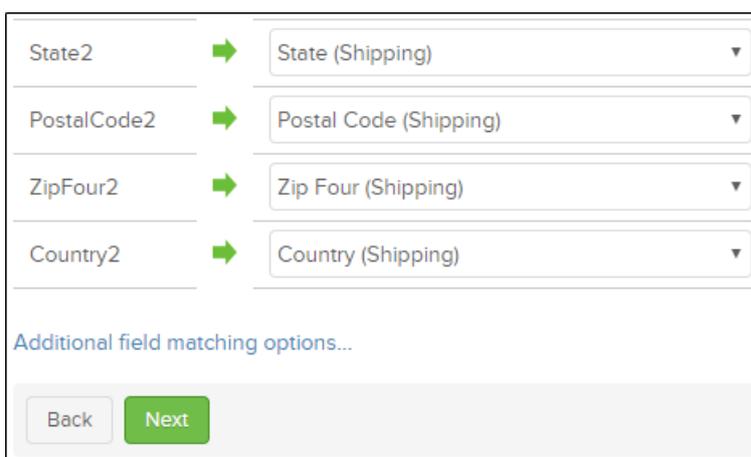
5. The **Upload your file** screen is displayed. Here, you can **Watch a video about importing contacts** for a video walk-through, **download a sample .csv file for importing contacts**, or click the **Browse** button to choose a local file on your computer to import. Once you've chosen a file, click **Next**.

Remember, the file must be a 'comma delimited .csv file' for your application to recognize it.

6. You will now be asked to match your fields to Keap's fields.

- The fields that Keap understands from your fields on the left will be displayed on the right with a green arrow in between.
- A yellow caution sign indicates that the field is not recognized by Keap.
 - Use the drop-down in the box to the right to match the field accordingly. You may choose from general information such as first name, last name, phone and fax, billing, shipping and optional addresses, additional, or global information.

7. If your field is not represented, click **Create tags from your field values**, **Add a custom field**, **Split full name to First, Last**, or **Do NOT import this field**.



8. Click **additional field matching options...** at the bottom of the page to add your field choice to multiple fields or to mass add a field value to the entire list.

9. Click **Next**.

10. The value matching screen appears where you can match the fields in your import to fields in Keap. An example would be if your list has the first phone number listed as Home, Work or Cell but Keap has it

matched as personal, business or mobile. You can change this in Keap globally to match your data.

11. Click **Next**.

Preparing for Email Marketing

Do you have permission to send marketing emails to these contacts?

Yes No

Because you've obtained permission to market to these contacts, you may import them and send them marketing emails.
See our [Email Deliverability Handbook](#) for more details.

Import Contacts

- Upload Your File
- Match Fields
- Match Field Values
- Email Marketing**
- Review the Import

Back Next

12. The **Preparing for Email Marketing** screen is displayed asking you to confirm you have permission to market to these contacts. Remember there is no need to opt-in your list again if they have already been opted in elsewhere in accordance with and in keeping with your end user agreement. Click [Email Deliverability Handbook](#) for more details.

13. Click **Next**.

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.

Previewing 1 of 2

First Name	John
Middle Name	E.
Last Name	Doe
Title	Mr.
Suffix	Jr.
Company	Infusionsoft
Job Title	Salesman
Leadsources	Direct Mail
Contact Notes	Met at winter conference
Tags	prospect, newsletter, event attendee
Email	john.doe@infusionsoft.com
Website	www.infusionsoft.com
Phone 1	480-555-1000
Number	
Phone 2	480-555-1212
Number	
Fax 1 Number	602-555-3333
Street Address 1 (Billing)	123 Sunset Dr
Street Address 2 (Billing)	Suite 204
City (Billing)	Gilbert
State (Billing)	AZ
Postal Code (Billing)	85233
Zip Four (Billing)	3404
Country (Billing)	United States
Street Address 1 (Shipping)	456 Sunset Dr
Street Address 2 (Shipping)	
City (Shipping)	Gilbert
State (Shipping)	AZ
Postal Code (Shipping)	85233
Zip Four (Shipping)	1245
Country (Shipping)	United States

Other Import Options:

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

[Run some Actions \(start a sequence, create tasks, etc...\)](#)

Back Done

14. A final preview screen is displayed.

15. Click the blue arrows to check that your contacts look correct.

16. At the bottom of the page you have the option of checking a box that will **Create a corresponding company record for everyone with a company.**

17. You can also run an action as soon as the contacts are imported. The most common action would be to add a tag(s) to these contacts in order to organize them. Click the **Run some actions (start a sequence, create tasks, etc...)** link to get started.

18.

Other Import Options:

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



[Run some Actions \(start a sequence, create tasks, etc...\)](#)

Back

Done

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 correct. [If you see something that looks a little off, you can click here to change how you](#)

Add New Action

Apply/Remove tag

Start/Stop a Campaign (Legacy)

Start/Stop a Follow-Up Sequence

Send an Email, Fax, etc.

Assign a contact to a user

Create an Appointment

Create a Task

Create Opportunity record

Set a contact field to a specific value

Create Referral Partner

Apply a Note template

Cancel a Subscription

Run another action set

Share this record with a user

Share this record with a group of users

Distribute record to another Infusionsoft by Keep application

Send an http post to another server

Copy actions from a saved action set

Create an Order

Add New Action

Back

Done

Actions

Apply/Remove Tag

To Apply or Remove?

1 Apply Remove

Apply these Tags

2

- Add contacts into the Nurture campaign
- asfdsadfsdf
- Bounce 1
- Bounce Remove
- E-mail Opt Out
- In Collections
- My New Tag
- New Customer**
- New Employee
- NPS - 0
- NPS - 5

[Create a new Tag...](#)

Only run this action when certain rules are met

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19. Click Done when you are finished