# 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.

1	A	В	C		А	В	С	D	E
1	First Name	Mother's Maiden Name	PN90 Import IXCUE	1	First Name	Last Name	Email	Phone	
2	Mickey	Blouse	SDF385	2	Mickey	Mouse	mickey@mouse.com	800-123-4	567
3	Donald	Truck	SLIE977	3	Donald	Duck	donald@mouse.com	800-234-5	578
4	Daisy	Buck	WEIN89	4	Daisy	Duck	daisy@mouse.com	866-123-4	567
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6				6					
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# Delete empty rows and columns

Blank rows and columns will corrupt the import.

	A	В	С	D	E	1	Δ	B	С	D	F
1	First Name	Last Name	Email		Phone	1	First Name	Last Name	Email	Phone	-
2	Mickey	Mouse	mickey@mouse.com		800-123-45	2	Mickey	Mouse	mickey@mouse.com	800-123-45	567
3						3	Donald	Duck	donald@mouse.com	800-234-56	578
4	Donald	Duck	donald@mouse.com		800-234-56	4	Daisy	Duck	daisy@mouse.com	866-123-4	
5	Daisy	Duck	daisy@mouse.com		866-123-45	5	Saisy	Duck	daisjeniouseitoini	000 120 10	
6						6					
						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.

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	Α	В	С	D	E		А	В	С	D	E
1	Fname	Lname	Em	Ph		1	First Name	Last Name	Email	Phone	
2	Mickey	Mouse	mickey@mouse.com	800-123-4	567	2	Mickey	Mouse	mickey@mouse.com	800-123-4	567
3	Donald	Duck	donald@mouse.com	800-234-5	678	3	Donald	Duck	donald@mouse.com	800-234-5	578
4	Daisy	Duck	daisy@mouse.com	866-123-4	567	4	Daisy	Duck	daisy@mouse.com	866-123-4	567
5						5					
6						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.

	Α	В	С	D	E		А	В	С	D	E
1	Fname	Lname	Phone	Email		1	First Name	Last Name	Email	Phone	
2	Mickey	Mouse	mickey@mouse.com	800-123-4	567	2	Mickey	Mouse	mickey@mouse.com	800-123-4	567
3	Donald	Duck	donald@mouse.com	800-234-5	678	3	Donald	Duck	donald@mouse.com	800-234-5	578
4	Daisy	Duck	daisy@mouse.com	866-123-4	567	4	Daisy	Duck	daisy@mouse.com	866-123-4	567
5						5					
6						6			× .		
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# Correctly format all dates

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

	Α	В	С	D	E		Α	В		С	D	E
1	First Name	Last Name	Birthday			1	First Name	Last Name	Birthday			
2	Mickey	Mouse	November 8th, 1928			2	Mickey	Mouse		11-08-1928		
3	Donald	Duck	June 9th, 1934			3	Donald	Duck		06-09-1934		
4	Daisy	Duck	January 9th, 1937			4	Daisy	Duck		01-09-1937		
5						5						
6						6						

# Place multiple phone numbers into separate columns

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

	А	В	С	D	E		А	В	С	D	E
1	First Name	Last Name	Phone			1	First Name	Last Name	Phone 1	Phone 2	
2	Mickey	Mouse	800-123-4567, 866-800-	1234		2	Mickey	Mouse	800-123-4567	866-800-1	234
3	Donald	Duck	800-123-4568, 866-800-	1235		3	Donald	Duck	800-123-4568	866-800-1	235
4	Daisy	Duck	800-123-4569, 866-800-	1236		4	Daisy	Duck	800-123-4569	866-800-1	236
5						5					
6						6					

# Phone extensions must be in a separate column

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

	А	В	С	D	E		А	В	С	D	E
1	First Name	Last Name	Phone			1	First Name	Last Name	Phone	Phone Ext.	
2	Mickey	Mouse	800-123-4567 x1			2	Mickey	Mouse	800-123-4567	1	
3	Donald	Duck	800-123-4567 x2			3	Donald	Duck	800-123-4567	2	
4	Daisy	Duck	800-123-4567 x3			4	Daisy	Duck	800-123-4567	3	
5						5					
6						6					

### Addresses must be separated into different columns

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

	А	В	С	D	E		А	В	С	D	E
1	First Name	Last Name	Address			1	First Name	Last Name	Street Address	City	State
2	Mickey	Mouse	1145 Buena Vista Dr, L	ake Buena	Vista, FL	2	Mickey	Mouse	1145 Buena Vista Dr	Lake Buen	FL
3	Donald	Duck	1145 Buena Vista Dr, L	ake Buena	Vista, FL	3	Donald	Duck	1145 Buena Vista Dr	Lake Buer	FL
4	Daisy	Duck	1145 Buena Vista Dr, L	ake Buena	Vista, FL	4	Daisy	Duck	1145 Buena Vista Dr	Lake Buer	FL
5						5					
6						6			×		

# Spell out country names

Abbreviations for countries will cause data to be imported improperly.

	А	В	С	D	E		Α	В	С	D	E
1	First Name	Last Name	Country			1	First Name	Last Name	Country		
2	Mickey	Mouse	USA			2	Mickey	Mouse	United States		
3	Donald	Duck	USA			3	Donald	Duck	United States		
4	Daisy	Duck	USA			4	Daisy	Duck	United States		
5						5					
6						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.

LeadSource		Leadsource	× J
JobTitle	•	Job Title	~
ContactNotes	•	Contact Notes	~
Tags	•	Create tags from your field values	~
Email	•	Email	~
Website	•	Website	~

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

		_	-	_	_				-	_	_
	A	В	C	D	E		A	B	C	D	E
1	First Name	Last Name	Tags			1	First Name	Last Name	Tags		
2	Mickey	Mouse	Customer;Actor			2	Mickey	Mouse	Customer, Actor		
3	Donald	Duck	Customer;Actor			3	Donald	Duck	Customer,Actor		
4	Daisy	Duck	Customer;Spouse			4	Daisy	Duck	Customer,Spouse		
5						5					
6						6					

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

¥ © ° 3⁄4 √ ♥

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.