

# Import contacts<sup>®</sup>

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This article applies to:

[Pro](#)

[Max](#)

## Pro-tip

- Duplicate contact checking is based on the contact's email address and will happen automatically; contacts with the same email address will not get imported twice.
- Contact info is updated/replaced when importing CSVs with an existing email address except for Email Statuses. We never automatically overwrite the Status of an Email Address from a list import (Non-Marketable, Opt-out, etc)
- You can locate a drop down item in field mapping by typing the word of the field that you want to map i.e. You want to quickly find "tags" you can start typing it with the drop down open and will be taken to that part of the list.

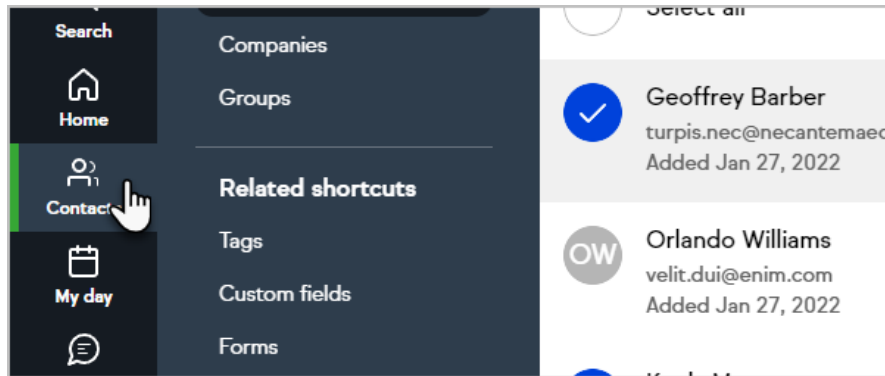
1. [Import your csv, xlsx, and xls files](#)
2. [Mapping fields](#)
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4. [Companies](#)
5. [Custom fields](#)
6. [Indicate permission](#)
7. [Add tag\(s\)](#)
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[Download this sample .csv file](#)

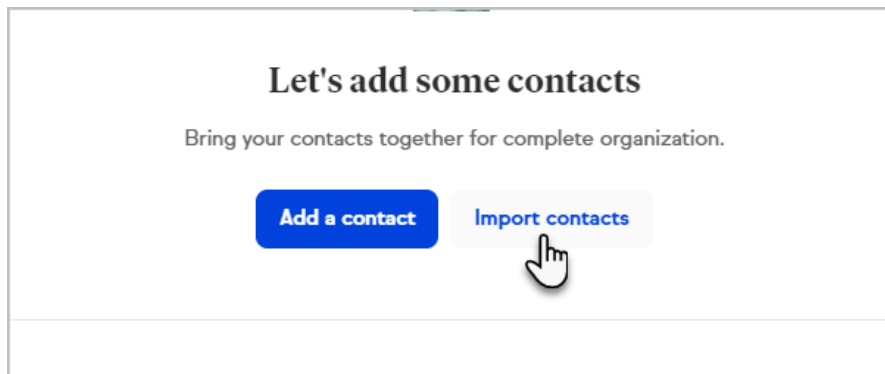
## Import your csv, xlsx, and xls files

Before you import, make sure that your data is in csv, xlsx, or xls file format and that they have been [properly prepared](#).

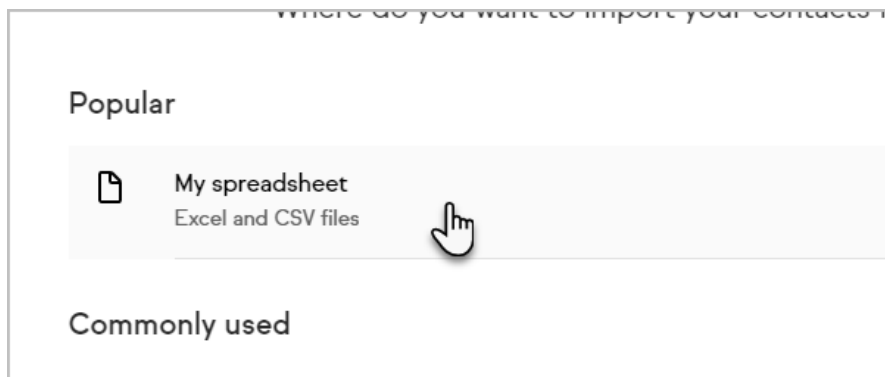
1. Click **Contacts > People** from the navigation menu



2. Click the **Import** contacts button



3. Select import type (note that the most common option "My spreadsheet" is at the top of the list.)



4. For a CSV file either click to upload or simply drag your file and drop into the Import window

## Mapping fields

Fields will automatically map to your Keap fields. However, if there are fields that cannot be matched match the Keap fields on the right to your CSV file columns on the left.

Keap does not allow mapping a field to a contact owner due to potentially putting an owner in the field that is not valid in the app.

Please match these 2 fields:

Your fields	Keap fields	
SurveyFeedback <small>"lectus sit amet luctus vulputate, nisi semper erat, in consectetur ipsum nunc id enim. Curabitur massa. Vestibulum accumsan"</small>	=	Select an option <span style="float: right;">▼</span> <small>Required</small>
Labels <small>"Tag 1, Tag 2"</small>	=	Select an option <span style="float: right;">▼</span> <small>Required</small>

Click the **Show matched fields** link at the bottom of the screen to view the auto matched fields

Hide 4 directly matched fields ^

FirstName <small>Rhea</small>	=	First name <span style="float: right;">▼</span>
LastName <small>Haney</small>	=	Last name <span style="float: right;">▼</span>
EmailAddress	=	Email <span style="float: right;">▼</span>

## CSV File display

In the top left corner of the field-mapping screen, it will display the name of the uploaded CSV file. Use this as a reference for what file you are working while matching fields.

← Import contacts

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CSV

Sample Import List - Sheet1.csv  
19 contacts

## Companies

Keap checks existing company records to prevent duplicate items.

Companies are not case sensitive, so contacts with companies of "keap", "Keap", and "KEAP" will all be imported under one company record. If the company does not yet exist in your CRM, the first instance of the company will determine the case used by Keap and can be [edited](#).

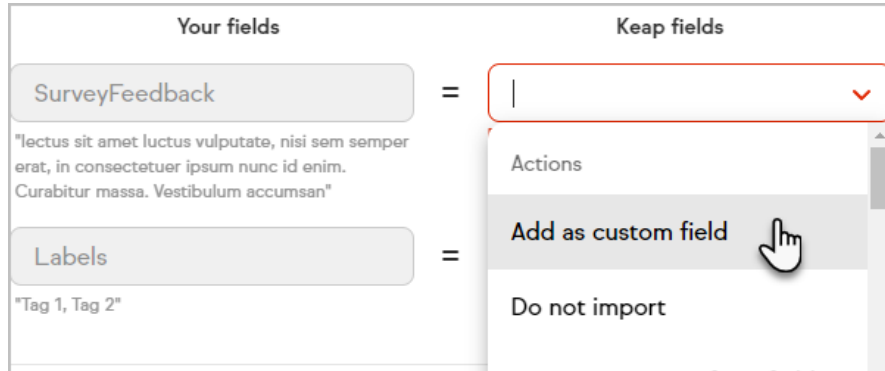
Keap also disregards any spaces before or after company names when importing

information, which means "Keap" and "Keap " are treated as the same company.

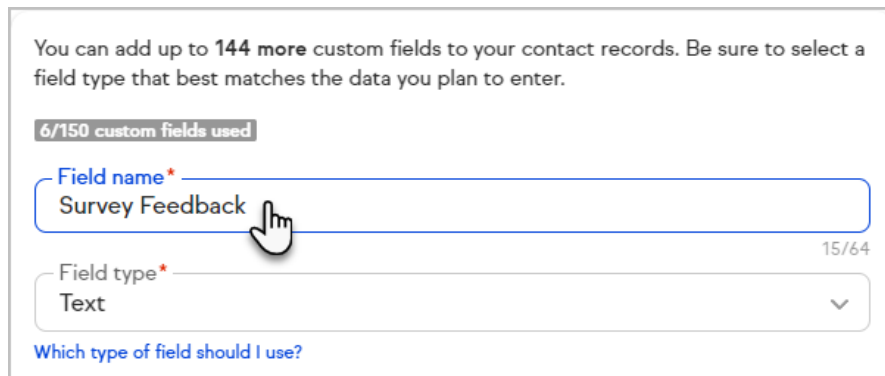
## Custom fields

Create custom fields on the field mapping screen

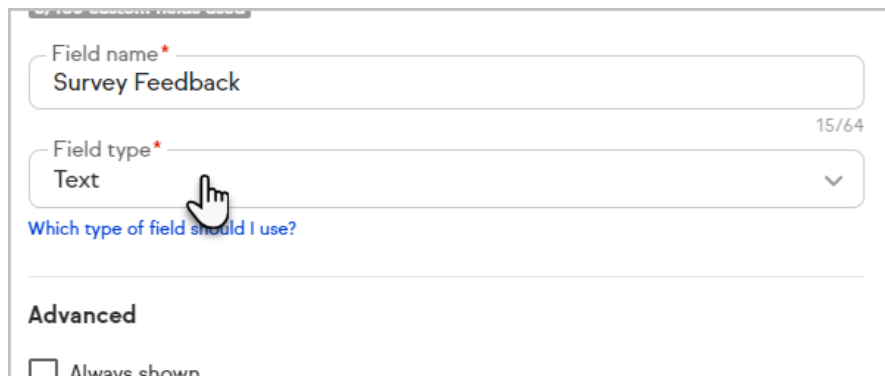
1. Click the **Add as custom field** option in the drop down menu



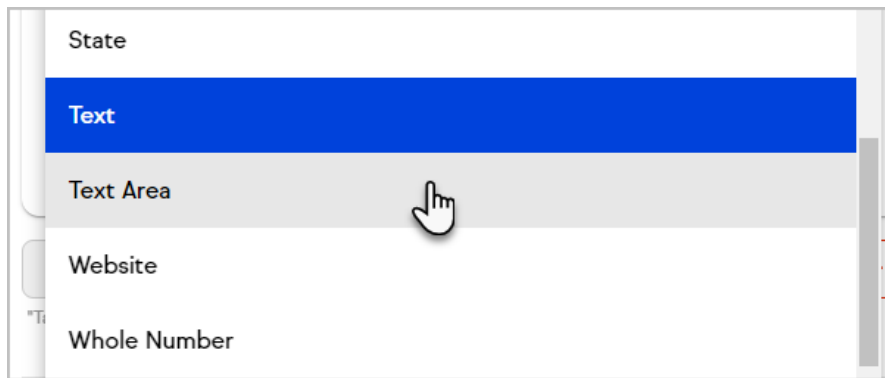
2. The name of the header in the CSV will automatically be added as the name of the custom field



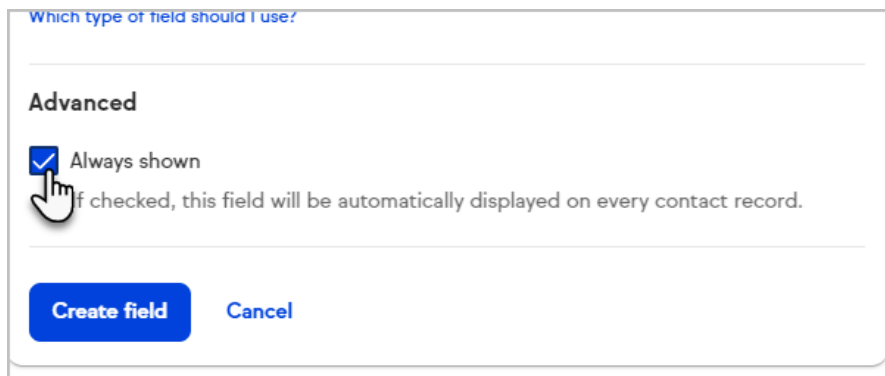
3. Click the drop down to select your field type



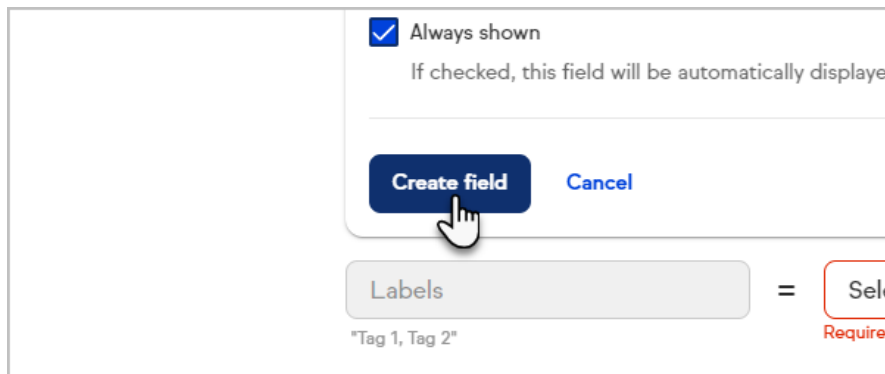
4. Select your field type



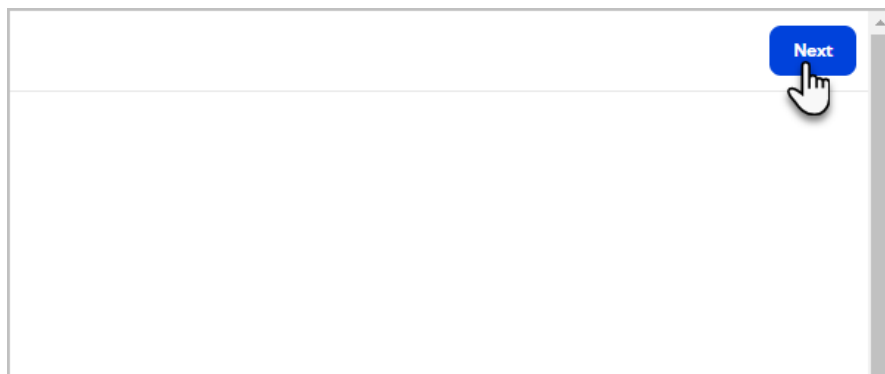
5. Optionally, you can choose to show this field by default while viewing any contact record.



6. Click **Create field**



7. Click **"Next"** at the top right of the page

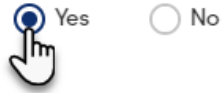


## Indicate permission

The last step is to indicate if you have Explicit permission to send marketing emails.

# One last thing...

Are these contacts expecting marketing emails from you?



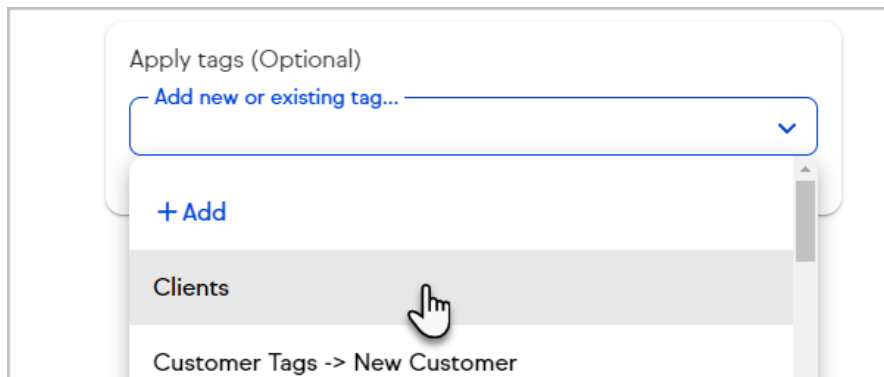
Because you've obtained permission to market to these contacts,

- If you do have permission check **Yes** (Make sure to review the [Acceptable Use Policy](#))
- If you do not have permission check **No** (You can send emails directly through the contact record but wouldn't be able to send bulk emails from an [Email Broadcast](#) or automation sequence) until your contacts [opt in](#).

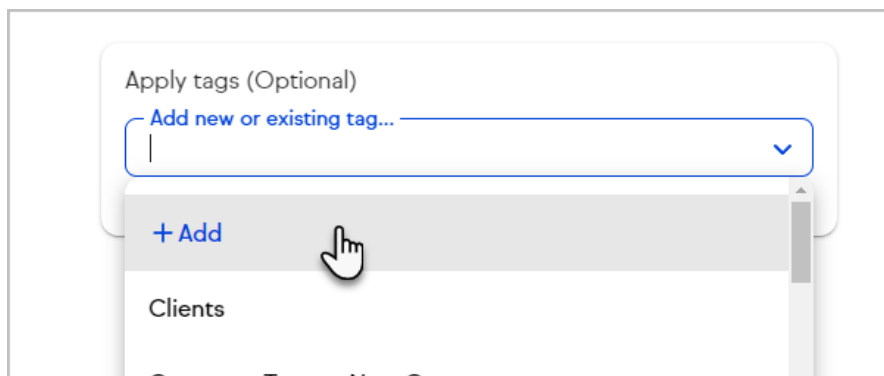
## Add tag(s)

You can automatically tag contacts upon import by either choosing:

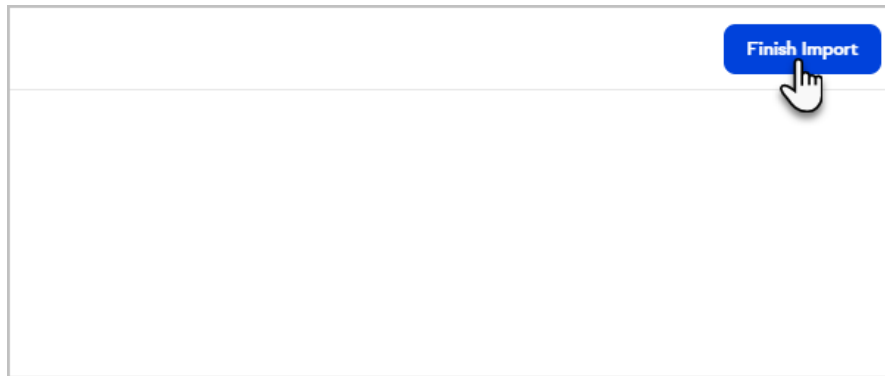
1. An existing tag



2. Or creating a new one on-the-fly



3. Click **Finish Import** when you're done

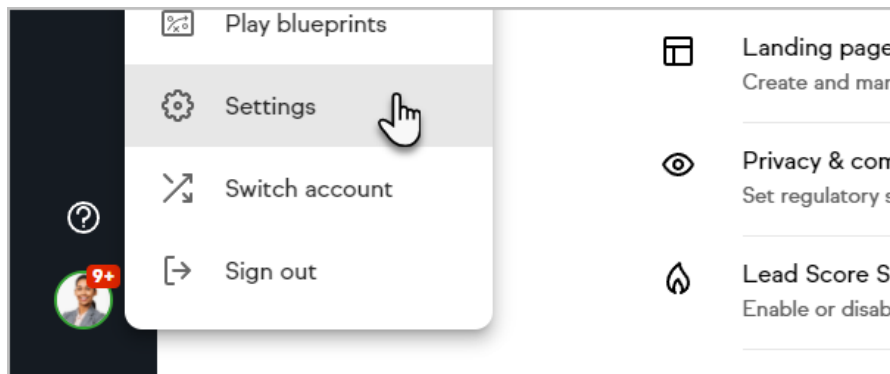


You can also use a Tags column in your spreadsheet to create new tags. Be careful: any column imported as a tag without commas separating the values will result in incorrect tag names.

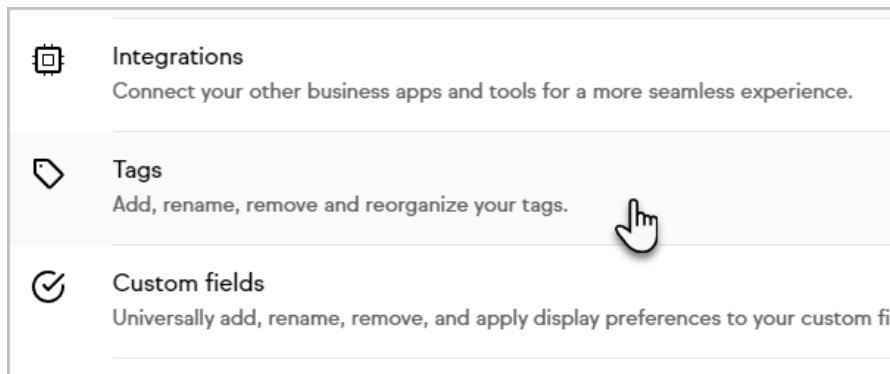
	A	B	C	D	E		A	B	C	D	E
1	First Name	Last Name	Tags			1	First Name	Last Name	Tags		
2	Mickey	Mouse	Customer,Actor			2	Mickey	Mouse	Customer,Actor		
3	Donald	Duck	Customer,Actor			3	Donald	Duck	Customer,Actor		
4	Daisy	Duck	Customer;Spouse			4	Daisy	Duck	Customer,Spouse		
5						5					
6						6					

## View import

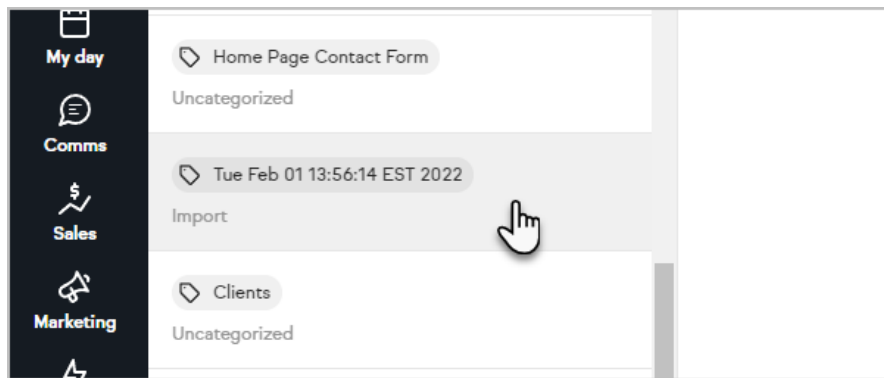
1. Go to **Settings**



2. Go to **Tags**



3. Click on the tag that was automatically created for your import.



## Update contacts

You can use our import tool to update multiple existing contacts already in your application based on their email. To update your contacts, create a .csv, .xlsx, or .xls that includes the contact's email and any other information you wish to update, then import the file as normal.

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