Prepare import ⌗

This article applies to:

After you export data from your current system(s), you should take time to clean it up before importing it into Keap. Data must be in a .CSV format; it's the only acceptable file type. Here are a few recommendations that will help your import go more smoothly.

Download this sample .csv file

1. Move any irrelevant data. Remove duplicate columns and columns that store information you won't need in Keap to segment, communicate, or produce reports.

2. Delete empty rows and columns. Blank rows and columns will corrupt the import.

3. Make the column headers clear and concise. If there are any confusing or unclear headers in your data, this can cause data to be imported to the wrong areas.

4. Ensure the column headers accurately describe the column of data. If the headers are wrong, the data will be imported into the wrong areas. For Example do not put Email Addresses under the Phone Header.

5. Correctly format all dates. MM-DD-YYYY, MM/DD/YYYY, YYYY-MM-DD, and

YYYY/MM/DD are all acceptable date formats.

	A	B	C	D	E
1	First Name	Last Name	Birthday		
2	Mickey	Mouse	November 8th, 1928		
3	Donald	Duck	June 9th, 1934		
4	Daisy	Duck	January 9th, 1937		
5					
6					

	A	B	C	D	E
1	First Name	Last Name	Birthday		
2	Mickey	Mouse	11-08-1928		
3	Donald	Duck	06-09-1934		
4	Daisy	Duck	01-09-1937		
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.

	A	B	C	D	E
1	First Name	Last Name	Phone		
2	Mickey	Mouse	800-123-4567, 866-800-1234		
3	Donald	Duck	800-123-4568, 866-800-1235		
4	Daisy	Duck	800-123-4569, 866-800-1236		
5					
6					

	A	B	C	D	E
1	First Name	Last Name	Phone 1	Phone 2	
2	Mickey	Mouse	800-123-4567	866-800-1234	
3	Donald	Duck	800-123-4568	866-800-1235	
4	Daisy	Duck	800-123-4569	866-800-1236	
5					
6					

7. Phone extensions must be in a separate column.Text or an extension within a phone field will cause an improper import.

	A	B	C	D	E
1	First Name	Last Name	Phone		
2	Mickey	Mouse	800-123-4567 x1		
3	Donald	Duck	800-123-4567 x2		
4	Daisy	Duck	800-123-4567 x3		
5					
6					

	A	B	C	D	E
1	First Name	Last Name	Phone	Phone Ext.	
2	Mickey	Mouse	800-123-4567	1	
3	Donald	Duck	800-123-4567	2	
4	Daisy	Duck	800-123-4567	3	
5					
6					

8. Addresses must be separated into different columns. A single field for a full address will cause data to be imported improperly.

	A	B	C	D	E
1	First Name	Last Name	Address		
2	Mickey	Mouse	1145 Buena Vista Dr, Lake Buena Vista, FL		
3	Donald	Duck	1145 Buena Vista Dr, Lake Buena Vista, FL		
4	Daisy	Duck	1145 Buena Vista Dr, Lake Buena Vista, FL		
5					
6					

	A	B	C	D	E
1	First Name	Last Name	Street Address	City	State
2	Mickey	Mouse	1145 Buena Vista Dr	Lake Buen	FL
3	Donald	Duck	1145 Buena Vista Dr	Lake Buen	FL
4	Daisy	Duck	1145 Buena Vista Dr	Lake Buen	FL
5					
6					

9. Fully spell-out country names. Abbreviations for countries will cause data to be imported improperly.

	A	B	C	D	E
1	First Name	Last Name	Country		
2	Mickey	Mouse	USA		
3	Donald	Duck	USA		
4	Daisy	Duck	USA		
5					
6					

	A	B	C	D	E
1	First Name	Last Name	Country		
2	Mickey	Mouse	United States		
3	Donald	Duck	United States		
4	Daisy	Duck	United States		
5					
6					

10. Make sure you are not importing contacts who have opted out of your email marketing! You will run into SPAM issues if you import people who have opted-out!