

Basic Import Service

Last modified on: 03/19/2025 1:13 pm MST

Are you moving from another system and need help importing your contacts? Good news - we're here to help! Please continue reading to see what's included with this service, how to submit your request and some of our most commonly asked questions.

What is this service?

Our Basic Import is a one-time service included with all of our new customer Implementation Plans. We'll import your contacts, contact notes, and tags at no additional charge to you!

This service is perfect for new Keap users who are transitioning from another platform and need assistance getting their data into Keap.

What's included with this service?

- Import of up to 5 total files of contacts, tags, and contact notes. You handle exporting it from your previous system, and we'll handle getting it into Keap! *Note: We work with CSV or Excel files; each tab or sheet in an Excel file counts as one file toward the total tally.*
- File prep for import: We'll review and prepare your files for import to make sure we're importing only the fields you need, and it all goes to the right place. *Note, this service does not include cleaning or manipulating your data beyond formatting it for the upload.*
- 1-2 business day completion: Once your files are submitted and prepped, the import is typically completed in 1-2 business days.
- Expert assistance: Your Keap Team will be with you every step of the way ensuring your data is imported exactly as you need it.

How long will the import take?

Basic Imports are typically completed within 1-2 business days. We'll reach out to you if there are any questions or concerns with the request.

How should my data be formatted?

Great question! Files must be in CSV or Excel format. If you do submit an Excel file, please note that each sheet or tab in an Excel file counts as a single file towards the total file count.

Do NOT delete any previous system ID's or "keys" - these may be needed as part of the import process.

The data should be separated into separate columns for each piece of information. For example, First Name and Last Name are in two separate columns. Addresses should be similarly split: Street Address 1, City, State, Postal Code and Country.

Each row in your file should represent a single contact or a single note. Ensure that contacts and notes are not split across multiple rows (see below for examples). A contact can have multiple notes, however, with each note appearing on its own row with the corresponding contact information present.

You can see our guide for formatting files [here](#), and Support is able to assist with any questions you might

have.

How can I use my Basic Import?

You'll want to coordinate submitting your Basic Import request with your Implementation Strategy Manager during your Implementation Service! If you aren't sure who you're working with yet, please reach out to Support for assistance.

More commonly asked questions

What if I have already used my Basic Import, but have more data to bring into Keap?

Great question! We can still assist with importing your data with one of our paid services. You can learn more about our import packages [here](#).

What if I didn't get an Implementation Package? Or completed my Implementation / Kickstart and only now need an import?

Our paid import packages are always available for purchase - you don't have to be a new customer, and they can be purchased à la carte at any time.

What if I have more than five total files?

You can combine similar files into one file, or alternatively, we can import additional files with one of our paid data services. You can learn more about our options [here](#).

What if there are concerns about how the import was completed?

Don't worry! If there are any concerns with how the data was imported, you'll be able to work with your Implementation Strategy Manager to correct any concerns or issues.

What if I have more data to import that isn't covered by the Basic Import?

No worries, we can still assist! Our paid import services include additional data types, such as tasks, opportunities, or orders. You can see what's able to be imported [here](#).

What if I need to bring over assets like landing pages and email templates?

Our Implementation Packages also come with complimentary 1:1 Recreation Service hours! We can help rebuild your landing pages, automations/funnels/campaigns, email templates, and web forms. Learn more [here](#).

What if I have more contacts to import than there is space for?

We do need to have enough space to import all unique contacts during the import process. Please [contact Support](#) to get assistance with increasing your contact package.

Will you help me clean my data?

We do offer some formatting assistance, which is detailed below! If your data requires more in-depth cleaning, that would need to happen before utilizing our services.

- Split full names into First Name and Last Name columns by the first space that appears in the full name.
- When the phone type is the column header (e.g. Column D is titled Mobile Phone), we can format that so that the phone type is imported with the phone number.
- Split the full address into separate columns, so long as the address has a unique symbol between the address elements (e.g. 1260 S Spectrum Blvd, Chandler, AZ, 85286, USA). If the data is not consistent or does not have a common character/symbol separating the types, you will need to clean the data before submitting the request.

Can you export my data from my current system for me?

You'll need to work with your current provider on how best to export your data. We wouldn't want to miss exporting something crucial, and they'll be best able to offer assistance. You can find documentation for some of the more common providers [here](#).

Which systems can you import from? Can you import from more than one system?

As long as you can export your data as a CSV and it's properly formatted, we can import it! We don't limit which systems you can move from. Some of the most common systems include Hubspot, MailChimp, Ontraport, and Salesforce, as well as many others! You can move data from multiple systems at the same time - we simply need all the data upfront in order to import.
