Import Services Packages

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Moving from another system and don't want to lose your historical data? Good news - our Data Team is here to help! We have multiple import packages available to suit your needs. Continue reading to see what's included with this service, how to submit your request, and some of our most commonly asked questions!

What can be imported

We can import a variety of data into your Keap application. If you don't see something listed, please reach out to Support for assistance - there may be other options available!

We can import the following types of data:

- Contacts
- Companies
- Notes
- Tags
- Tasks
- Appointments
- Opportunities or Deals
- Products
- Orders
- Subscriptions
- Credit Cards
- Referral Partners / Affiliates
- File Attachments

If you'd like us to recreate your marketing assets, including landing pages, email templates, automations/funnels, and web forms, please see our 1:1 Recreation Service to learn more!

What's included with this service

We currently offer 5 different import packages to best suit your needs. Each package includes the following:

- **Import your data into Keap**: You handle exporting it from your previous system, and we'll handle getting it into Keap!
    - Our Advanced Import, Limited E-Commerce Import, and E-Commerce Imports all include up to 50 total files.
    - 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.*
- **Expert assistance**: Your Keap Team will be with you every step of the way ensuring your data is imported exactly as you need it.

Available Import Packages

If you don't need a full package, we also offer hourly imports at $150 USD per hour, with a two-hour minimum.

	Free Basic Import: $0 (comes with your Implementation Package)	**Advanced Import: $999**	**Limited E-Commerce Import: $999**	**E-Commerce Import: $1,999**	**Credit Card Import: $399**
Contacts	✔	✔	✔	✔	✔
Companies	✘	✔	✘	✔	✘
Tags	✔	✔	✘	✔	✘
Notes	✔	✔	✘	✔	✘
Tasks	✘	✔	✘	✔	✘
Appointments	✘	✔ *	✘	✔ *	✘
Deals or Opportunities	✘	✔	✘	✔	✘
Products	✘	✔	✔	✔	✘
Orders	✘	✘	✔	✔	✘
Subscriptions	✘	✘	✔	✔	✘
Credit Card Data	✘	✘	✔	✔	✔
Referral Partners	✘	✘	✘	✔	✘
File Attachments	✘	✘	✘	✔	✘

** Please note, there are some limitations around what can be imported.*

How long will the import take?

Our data imports typically take between 3-7 business days to complete once we are able to begin fulfillment. The timeline will vary based on the complexity of the import and the amount of data being handled, and on some occasions can take up to 14 business days.

Before we begin the import process, we'll review the specifics of the request together to ensure we're importing your data in the best way possible. This typically takes an additional 2-5 business days to complete.

How do I request an import?

You can request a paid import by contacting support for assistance! Don't worry if you still have some questions - you'll have the opportunity to work with a Data Specialist before moving forward.

If you're currently going through Implementation and Onboarding, you can learn more about our Free Basic Import by clicking here. Your Implementation Strategy Manager will be able to assist you with next steps.

What does the process look like?

Once you're ready to move forward with your service, here's what to expect:

- First, you'll meet with one of our Service Specialists to review your request. We'll go over what you're looking to achieve, where you're moving from, etc.
- We'll prep by reviewing the data together to make sure we understand what goes where and that there are no surprises.
- At this point, we'll get you added to our queue for fulfillment. Once we're able to begin working on your request, you'll provide a fresh copy of your data to import.
- Our Data Specialists will work on importing your content, getting everything in the right order and place, and then QA the work.
- Once done, you'll have 5 business days to review the work in case you need something adjusted.

Commonly Asked Questions

Where can I find out more information about the Free Basic Import?
So glad you asked! You can find out more about what is included, who qualifies, and how to submit that request here.

Which systems can you import from? Can you import from more than one system?
As long as your data is in CSV and properly formatted, we can work with you to import that data! We don't restrict which systems you can move from. Some common systems include Hubspot, MailChimp, Ontraport and Salesforce, as well as many others!

We can import data from multiple systems at the same time - we simply need all the data up front in order to move forward.

Are there any limits around what can be imported?
We do limit the total amount of files to 50 for our Advanced Import, Limited E-Commerce Import, and our E-Commerce Import. If Excel files are submitted, please note that each sheet in an Excel file counts as a single file.

Each file attachment must be 10 MB or smaller, whether being added to the contact record directly, or in the company images or files section.

Do I need to format my data in a particular way in order to import?
Great question! Files must be in CSV format. If you do submit an Excel file, please note that each sheet in an Excel file counts as a single file.

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.

The data for a single item (e.g. a single contact, a single note, etc.) must be on the same row. We cannot work with data where information for a single item is split across multiple rows.

You can see our guide for formatting files here, and Support is able to assist with any questions you might have.

What if there are differences in how Keap functions compared to my previous system?
All of our Import Projects start with a scoping call where we dig into the specifics of your request! Our Data Specialists will dive into what we're importing, where it would go and how it would look, and any concerns or questions that you might have. You and the Data Specialist will work together to make sure that your data is imported the best way possible into the system, even if it's not an exact one-to-one match.

Can I use my application while the import is taking place?
Absolutely! We encourage you to work in your application during the import period. Many of our users build out additional content, invoice their clients, or grow their lists while we work! Your Data Specialist can help guide you through what might or might not be available during this process.

What if I have concerns about how the data was imported?
Don't worry! When the import is complete, there will be a window for review in which you'll be able to request changes. Sometimes it's hard to see how the data "looks" before it's in the system.

Am I able to import my data on my own?
Some data, such as contacts and tags, can easily be imported from the front end, while some data does require backend access to process the request. You can contact Support to learn more about what can and can't be imported directly in your application.