Advanced - Setting up your CSV and Custom Fields | Check for duplicates before importing contacts to Media Shield

Whether this is your first CRM or you're moving from another system, importing helps you create records and update your database.

Each row represents a contact record, and each column of information represents a contact property (First Name, Last Name, Email Address, etc.)

Covered in this article:

Pre-requisites:

How to import contacts into the CRM

Step 1: Setting up your CSV and Custom Fields before importing

Step 2: Check for duplicates

Step 3: Importing your contacts

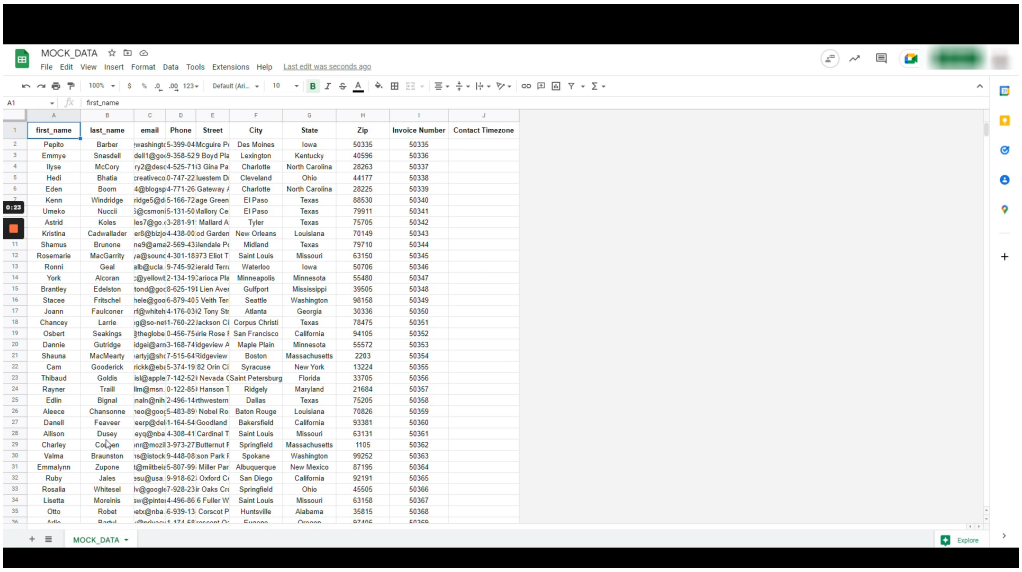
- **1st Method:** If your CSV **has a** phone # and or email, please follow this CSV setup guide
- **2nd Method:** If your CSV **does NOT** have an email and or phone # follow this setup guide (Getting contact ID)

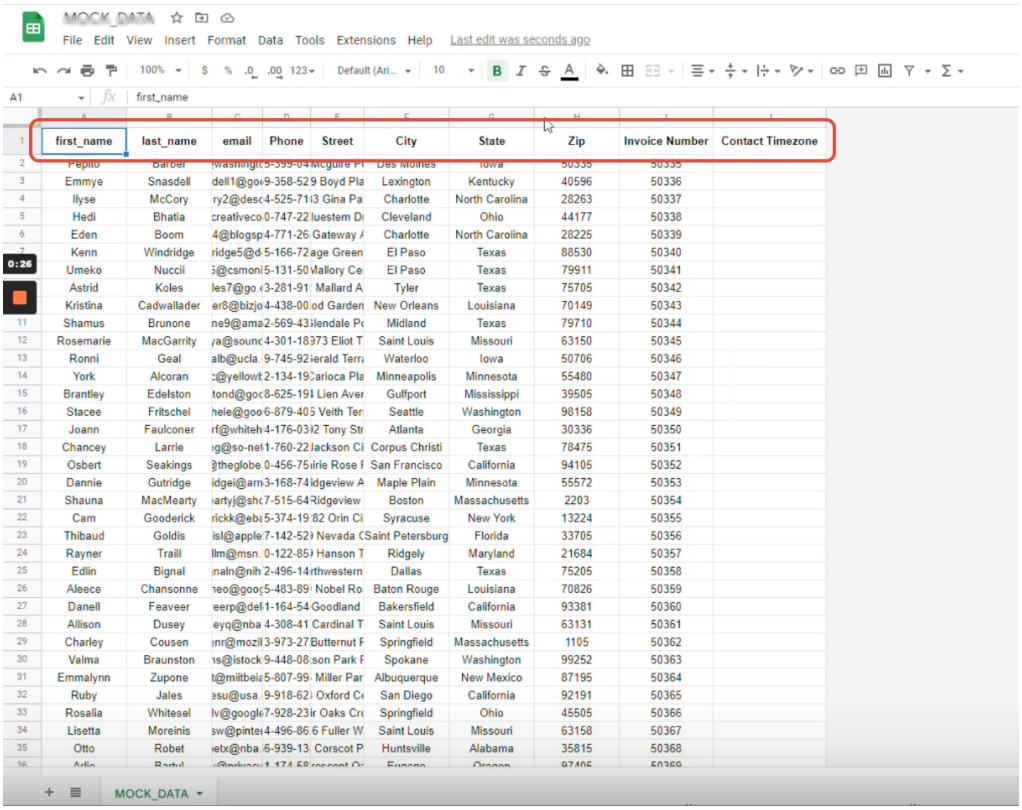
Pre-requisites:

- Only users with an 'Admin role will have the option to import and export contacts.
- The import file needs to be a **.csv** file
- Have only **one** sheet/tab within the spreadsheet
- Be smaller than **50MB**
  (**Note:** a typical .csv file with 4 columns and 10,000 records will be ~500kb in size)
- The first row should **NOT** be blank! Include a header row in which at least one column header corresponds to a field in the system

How to import contacts into the CRM

- **Step 1:** Setting up your CSV and Custom Fields before importing





Please Note:

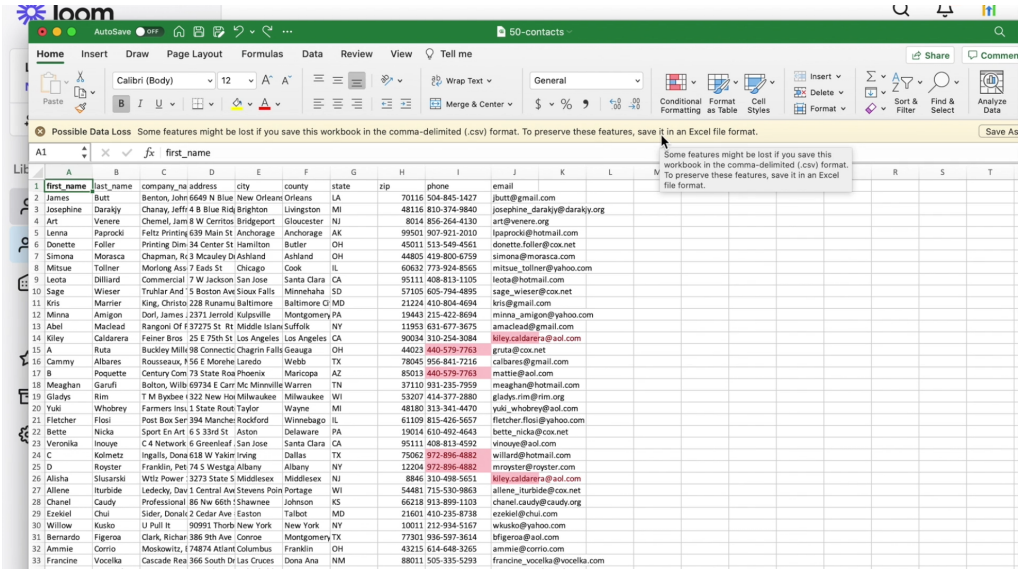
> - When adding a **+ sign** for the area code for a phone number a ' **(apostrophy)** is needed at the

> start for the CSV file. The + disappears without it. It prevents the excel file to format the number: ie '+19168128779 (Correct format)
>
> - File Upload and Signature Fields are **NOT** supported when importing
>
> - When important contacts with a DND column within your CSV please note that the contact will be DND for ALL the channels. If you would like to DND for specific channels please set up a workflow first and use tags

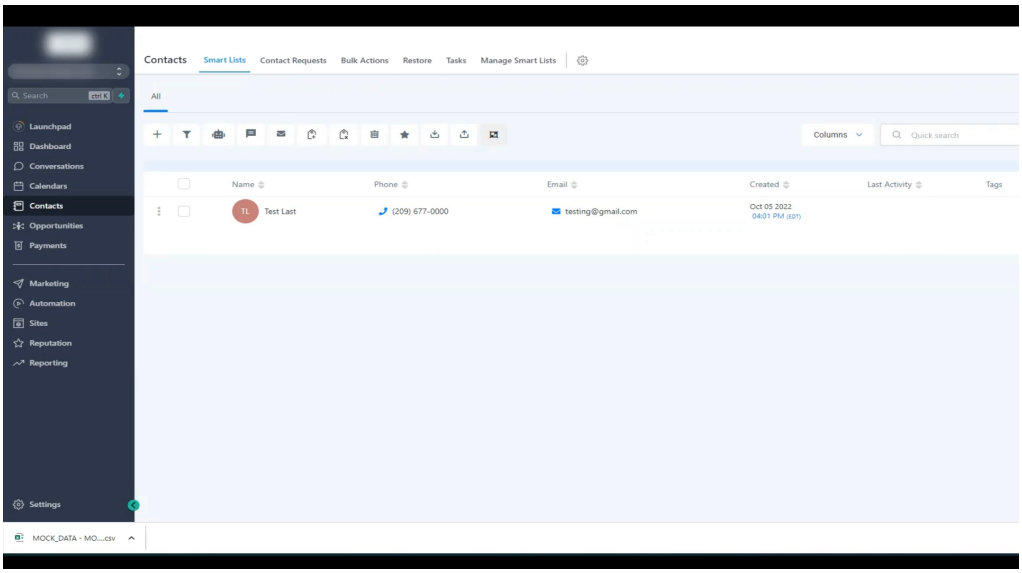
It's always best practice to clean your list and check for duplicates before importing into any software, especially if you are running cold traffic campaigns. Failure to do so can result in deliverability issues.

Step 2: Check for duplicates.

> It's always best practice to clean your list and check for duplicates before importing into any software, especially if you are running cold traffic campaigns. Failure to do so can result in deliverability issues.



Step 3: Importing your contacts



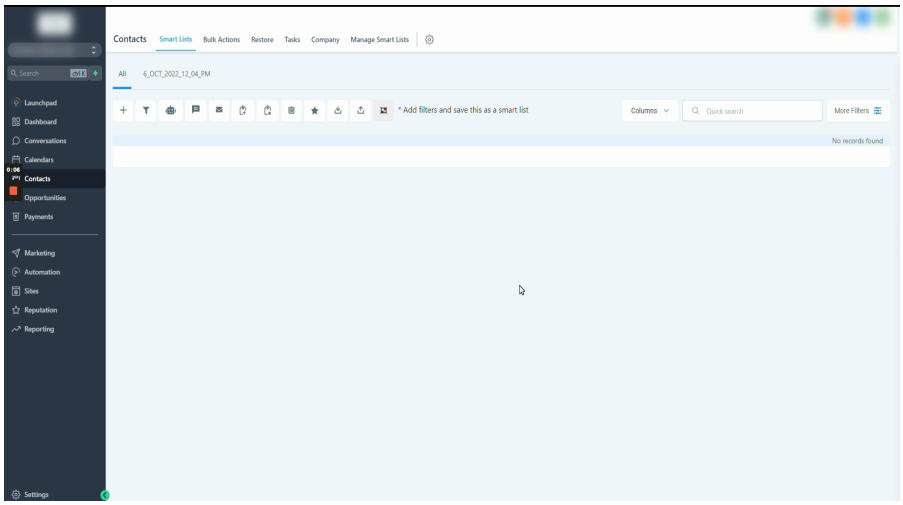
There are two methods to import contacts depending on your CSV data:

1st Method: If your CSV has a **phone # and or email** please follow the **1st method** below

2nd Method: If your CSV does **NOT** have an **email and or phone #,** please follow the **2nd method** below (Getting contact ID)

1st Method: If your CSV **has a phone # and or email,** please follow this CSV setup guide

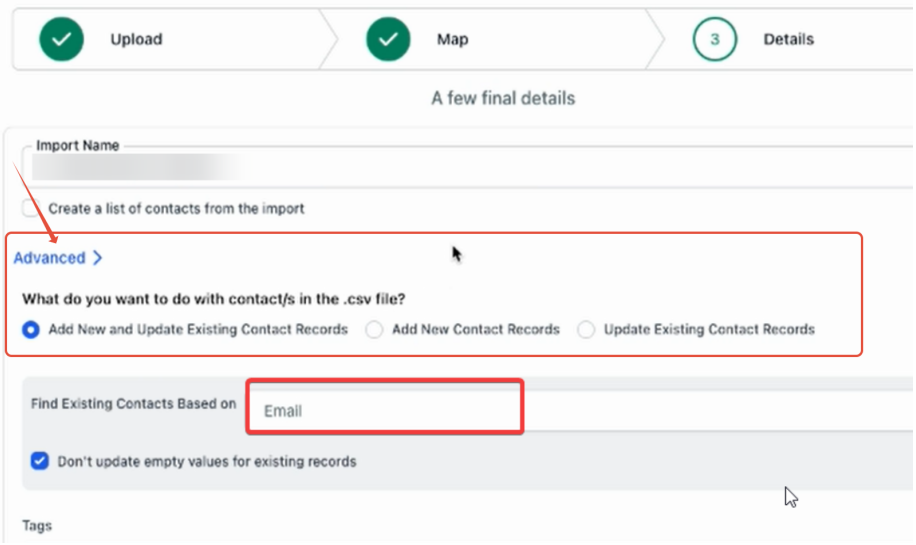
2nd Method: If your CSV **does NOT** have **an email and or phone #,** please watch the video below



Please Note:

> Contact ID unique identifier only shows up if you have a column header with Contact ID written as the header title.

Breaking down advanced filters:



- **Add New and Update Existing Contact Records:**
  This means that it will create new contacts, and if you have any leads that are already in the system, it will update them with the information from your CSV file. The system will check for existing contacts in the location based on the unique identifier that you have selected (Primary or Secondary preference).

- **Add New Contact Records:**
  This will create new contact records and will not update existing contacts in the location.

- **Update Existing Contact Records:**
  This option will only update existing contact records and not create new contacts in the location.

Please Note:

> While the **default** unique identifier is Email, our system allows you to choose fields other than Email for de-duplication purposes during the Bulk CSV Upload

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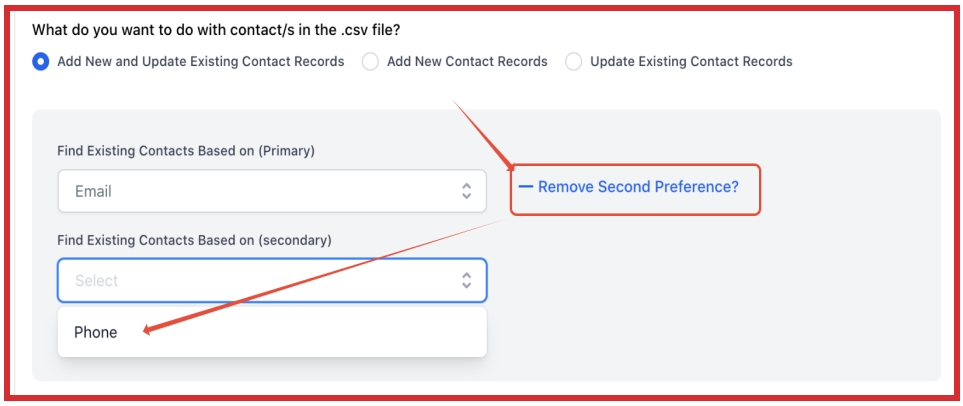
FAQ

My CSV list is mixed, some contacts either have an email or phone #, and some have both an email and phone; how should I proceed?



Please use the '**secondary preference**' option for a CSV that is mixed. The system will search for the first preference and then the second if it cannot locate the first. In the example above the first preference is '**Email**' and the second is '**Phone**.'

Now we can find existing contact based on the secondary field, so if the contact record has only the phone number, we will be able to upload them as well!

Some of my contacts have multiple emails and or phone numbers.

How should I proceed?

If a contact has multiple phone numbers or emails, please split the contacts into multiple so they will be uploaded.

Example:

Original with two phone number columns:

Josephine	810-292 9388	810-374-9840	josephine_darakjy@darakjy.org

Cleaned for upload version:

Josephine	810-292-9388	josephine_darakjy@darakjy.org
Josephine	810-374-9840	

Keep the email blank for the second lead with a different phone number because it will create duplicates when we upload contacts with phone numbers as the unique field.

Important note for people that use Keap:

The phone field from the CSV export in Keap is not compatible with Media Shield. The parenthesis '()' and dashes '-' make it incompatible. We have to highlight the entire column in the CSV file and make sure it is numbered in, then remove any parenthesis and dashes, and then we can import without corrupting the data in the CRM.

When importing the phone numbers, I get the error code 1007, 'invalid required property:

When importing numbers, make sure to add a country code for **numbers that are outside of the sub-account country**. If, for example, the sub-account country is set to the US, you **won't need to add a +1** (US country code) to the phone numbers being imported. However, if you're importing numbers that are outside of the US, you will need to add the **country code for those numbers**.

> **I.e.,** USA numbers don't need a +1, but if the Sub-Accounts country is set to a different country than the USA (UK, Australia, etc.), you would need to add a **+1 or the country's area code to the number in the CSV File.**

I'm trying to import a CSV with a DND Column, but all contacts are set to DND for ALL channels.

When importing contacts with a DND column within your CSV, please note that the contacts will be DND for ALL the channels. If you would like to DND for specific channels, please set up a workflow first and use tags for each channel.

> **I.e.,** I would like john to be DND for SMS only. I would create a workflow that DNDs a contact when a tag 'DND SMS' is added. So now, on the CSV, I would add the Tag 'DND SMS' next to John's name. When importing, this would fire automation to DND John for SMS Only.

I'm trying to import a CSV with Notes, and I am not able to generate more than one note per contact record.

When importing contact notes, you may only have one note per contact record with a limit of **5000 characters**. In the event you have more than one note or more characters than the allowed amount, please use the large text custom field.

Please note:

> **For a detailed troublshooting doc please see: Troubleshooting Bulk Imports Via CSV**