

# 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**

	first_name	last_name	email	Phone	Street	City	State	Zip	Invoice Number	Contact Timezone
1	Peppio	Barber	washnig5-399-44McGuire P		Des Moines	Iowa	50335	50335		
2	Emmye	Snasdel	dell1@gov-9-358-529 Boyd Pla		Lexington	Kentucky	40596	50336		
3	Ilyse	McCory	ry2@desc-4-525-713 Gina Pa		Charlotte	North Carolina	28263	50337		
4	Hedi	Bhatia	creativeco-7-147-22 luestem Di		Cleveland	Ohio	44177	50338		
5	Eden	Boom	4@blogspot-4-771-26 Gateway /		Charlotte	North Carolina	28225	50339		
6	Kenn	Windridge	ridge5@d-5-166-72age Green		El Paso	Texas	88530	50340		
7	Umeko	Nucci	3@csmon1-5-131-50 Mallory Ce		El Paso	Texas	79911	50341		
8	Astrid	Koles	les7@gov-3-281-91 Mallard A		Tyler	Texas	75705	50342		
9	Kristina	Cadwallader	er6@bzj0-4-438-00 od Garden		New Orleans	Louisiana	70149	50343		
10	Shamus	Brunone	ne9@ams2-569-43lendale Pr		Midland	Texas	79710	50344		
11	Rosemarie	MacGarity	ra@sounc-4-301-18373 Eliot T		Saint Louis	Missouri	63150	50345		
12	Ronni	Geal	alb@ucla-9-745-92ierald Terri		Waterloo	Iowa	50706	50346		
13	York	Alcoran	3@yellowt-2-134-19arioca Pla		Minneapolis	Minnesota	55480	50347		
14	Brantley	Edelston	tond@goc-6-625-191 Lien Aver		Gulfport	Mississippi	39505	50348		
15	Stacey	Fritschel	hele@goo-6-879-405 Velth Ter		Seattle	Washington	98158	50349		
16	Joann	Faulconer	rf@whiteh-4-176-0312 Tony Str		Atlanta	Georgia	30336	50350		
17	Chancey	Larrie	ig@so-net1-760-22Jackson Ci		Corpus Christi	Texas	78475	50351		
18	Osbert	Seakings	3@heglobe-0-456-75iirie Rose I		San Francisco	California	94105	50352		
19	Dannie	Gutridge	ldge@arn3-168-74ldgeview A		Maple Plain	Minnesota	55572	50353		
20	Shauna	MacMearty	artyj@shc-7-515-64Ridgeview		Boston	Massachusetts	2203	50354		
21	Cam	Gooderick	rickk@ebi-5-374-19 82 Orin Ci		Syracuse	New York	13224	50355		
22	Thibaud	Goldis	isl@apple-7-142-521 Nevada CSaint Petersburg		Florida	33705	50356			
23	Rayner	Trall	lm@msn-0-122-851 Hanson T		Ridgely	Maryland	21684	50357		
24	Edlin	Signal	naln@nh-2-496-14rthwestern		Dallas	Texas	75205	50358		
25	Alece	Chansonne	teo@goo-5-483-891 Nobel Ro		Baton Rouge	Louisiana	70826	50359		
26	Danell	Feaveer	eerp@del-1-164-54Goodland		Bakersfield	California	93381	50360		
27	Allison	Dusey	ayq@nba-4-308-41 Cardinal T		Saint Louis	Missouri	63131	50361		
28	Charley	Cousen	mr@mozil-3-973-27Butternut F		Springfield	Massachusetts	1105	50362		
29	Valma	Braunston	rs@istock-9-448-08son Park F		Spokane	Washington	99252	50363		
30	Emmalynn	Zupone	lg@mltbeic-5-807-991 Miller Par		Albuquerque	New Mexico	87195	50364		
31	Ruby	Jales	3su@usa-9-918-621 Oxford Cr		San Diego	California	92191	50365		
32	Rosalia	Whitesel	lv@google-7-928-231r Oaks Cr		Springfield	Ohio	45505	50366		
33	Lisetta	Moreinis	sw@pinter-4-496-86 6 Fuller W		Saint Louis	Missouri	63158	50367		
34	Otto	Robet	etx@nba-6-939-13 Corscot P		Huntsville	Alabama	35815	50368		
35	Artie	Burnd	3@edison-1-174-58rreppent Di		Evansville	Indiana	47416	50369		

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## 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

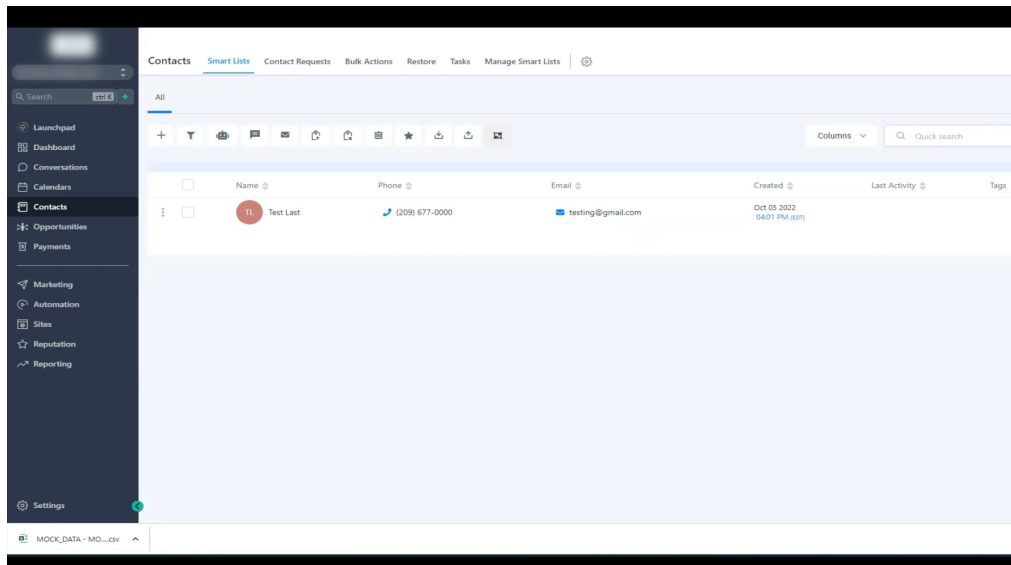
- When importing contacts with a DND column within your CSV please note that the contact will be DND for ALL the channels. If you would like to DND for specific channels please set up a workflow first and use tags

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



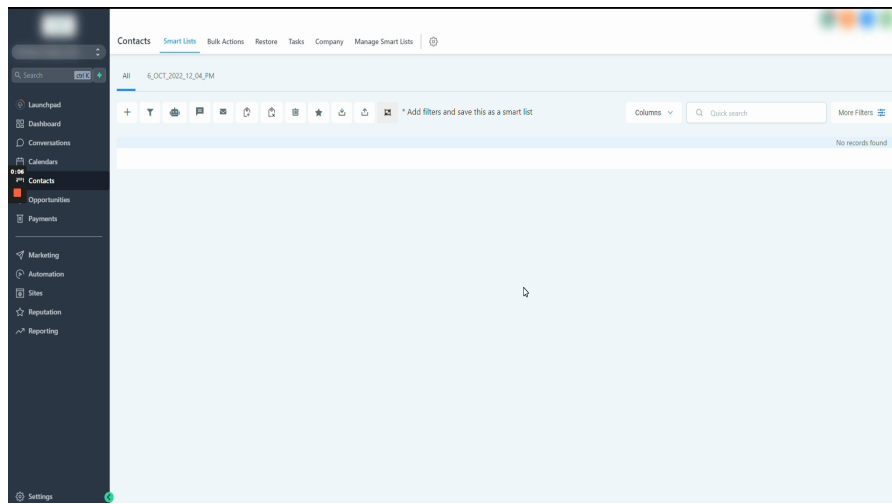
There are two methods to import contacts depending on your CSV data:

**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:

Upload Map Details

A few final details

Import Name

☐ Create a list of contacts from the import

[Advanced >](#)

What do you want to do with contact/s in the .csv file?

☒ Add New and Update Existing Contact Records ☐ Add New Contact Records ☐ Update Existing Contact Records

Find Existing Contacts Based on

☒ Don't update empty values for existing records

Tags

- **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

## 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?**

The screenshot shows a web form titled "What do you want to do with contact/s in the .csv file?". It has three radio button options: "Add New and Update Existing Contact Records" (selected), "Add New Contact Records", and "Update Existing Contact Records". Below these are two sections for finding existing contacts. The first section, "Find Existing Contacts Based on (Primary)", has a dropdown menu currently showing "Email". The second section, "Find Existing Contacts Based on (secondary)", has a dropdown menu currently showing "Select". A red box highlights the "Remove Second Preference?" link next to the primary dropdown. Red arrows point from the "Remove Second Preference?" link to the "Select" option in the secondary dropdown, and from the "Select" option to the "Phone" option in the dropdown's list.

What do you want to do with contact/s in the .csv file?

☒ Add New and Update Existing Contact Records ☐ Add New Contact Records ☐ Update Existing Contact Records

Find Existing Contacts Based on (Primary)

Email

Find Existing Contacts Based on (secondary)

Select

Phone

[Remove Second Preference?](#)

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
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#### 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**.

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**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.

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**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 troubleshooting doc please see:  
Troubleshooting Bulk Imports Via CSV**



