CITK

Merging Contacts

Whether this is your first CRM or you are moving from another system, importing lets you create records and update your existing database.

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

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.

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

Please Note:

- When adding a phone number that requires a "

+

" sign, please add an apostrophe at the beginning of the number, like this:

'+

191668128779 (Correct format).

- File

Upload
and

Signature
Fields are NOT supported when importing

- When important contacts are 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

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 results in deliverability issues

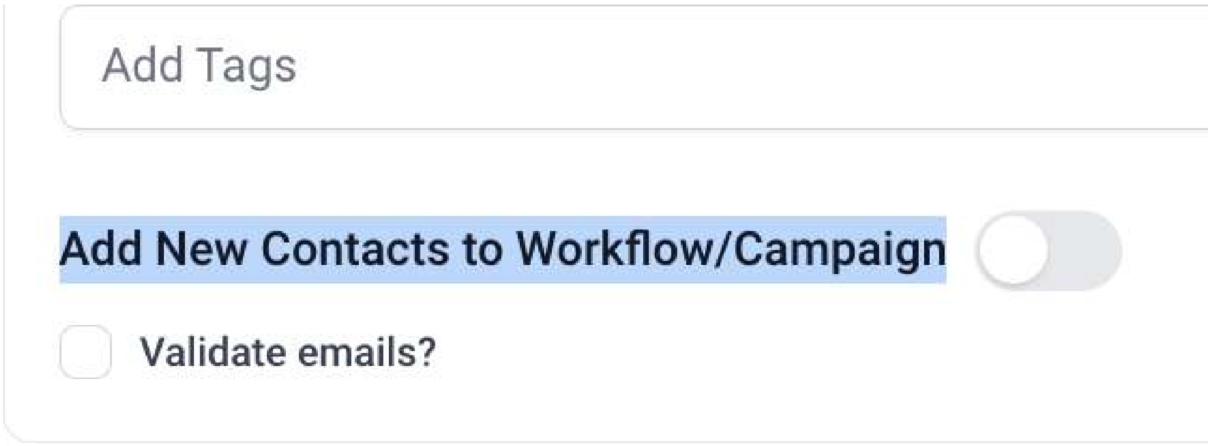
There are two methods to import contacts depending on your CSV data:

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

Please Note:



The Add to Workflow/Campaign toggle only works for new contacts and not contacts that are being updated through the CSV file.

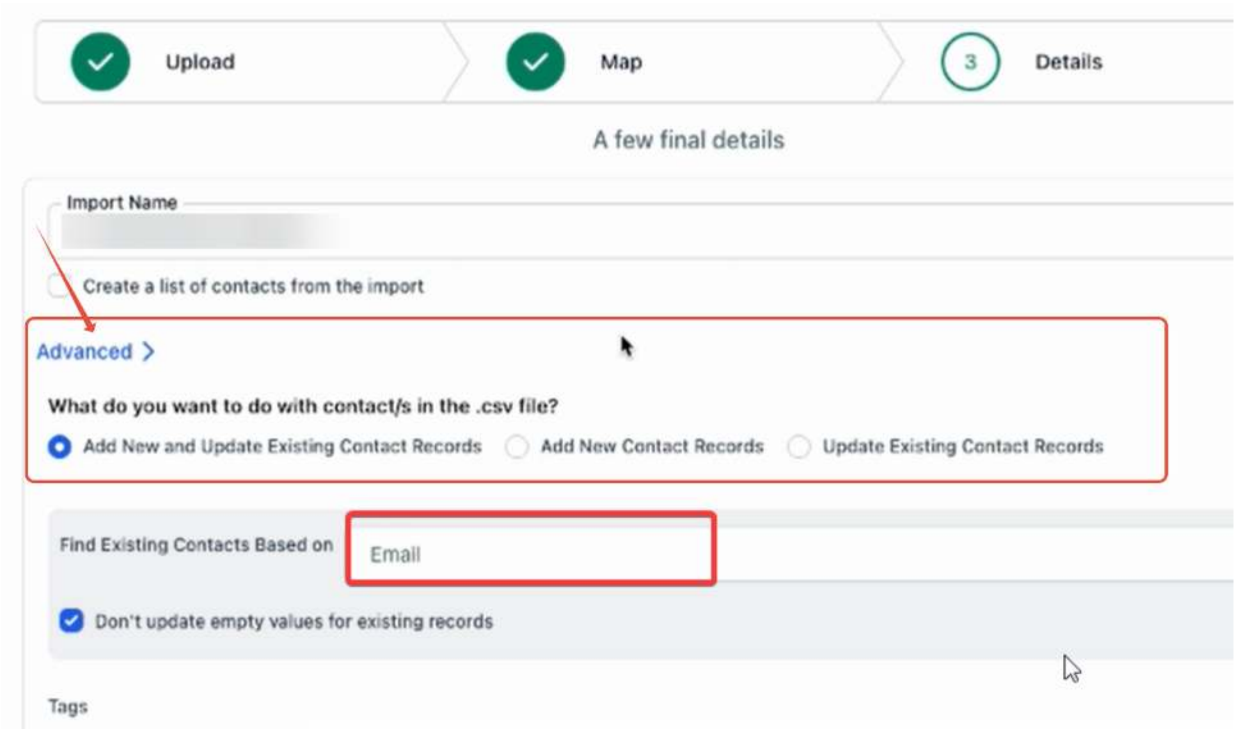
2nd Method: If your CSV does NOT have an email and or phone #, please watch the video below

Please Note:

Contact ID unique identifier only shows up if you have a column header with Contact ID written as the header title.
When selecting the unique identifier (Email, Phone or Contact ID) The system will only use identifie

Example: My CSV has mixed emails and phone numbers, some contacts share emails like

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 already in the system, it will update them with the information from your CSV file. The system will check for existing contacts in the sub-account based on the unique identifier (Email, phone, or contact id) you selected
- **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:

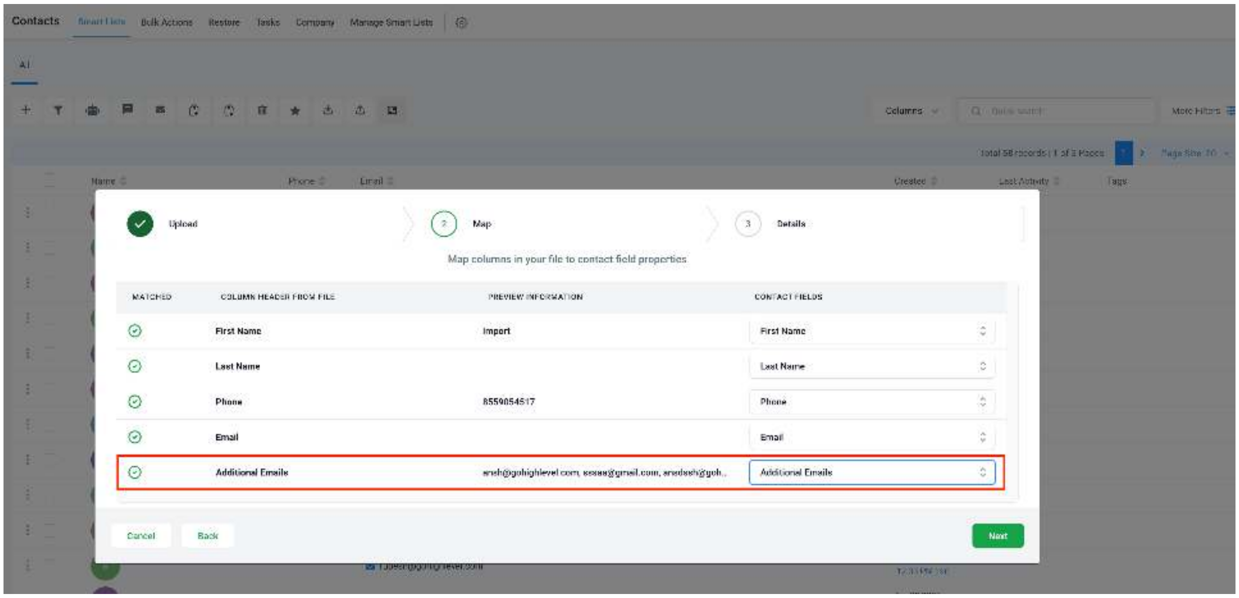
While the **default** unique identifier is Email, our system allows you to choose fields other than Email for de-duplication purposes during the Bu

You can leverage the power of effective contact management with our new 'Additional Emails' feature, complemented by the Bulk Import capability. Seamlessly map, manage, and maintain multiple emails for each contact, enhancing data handling. Our innovative approach simplifies large-volume data management, ensuring a streamlined and efficient process for users.

Conditions to import:

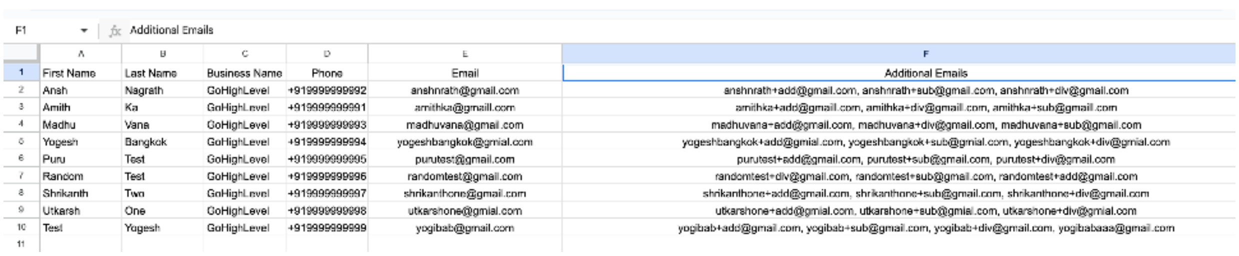
- To ensure contact uniqueness, both the primary and additional email (if selected as the first preference) will be used. In cases where multiple duplicate matches are found for an additional email, that specific email will be left out.
- Any invalid emails in the additional fields will be removed, leaving only valid ones for a contact.
- If the email column in the CSV is blank, but the additional email column has values, the first additional email will serve as the primary email.
- When updating an existing contact, the specified emails in the CSV will be combined with the ones already associated with the contact.
- The "Additional Email" column can hold a maximum of 10 email IDs, with only the first 10 being considered if more are included.

Steps to Import



- Within the Contact Import section, users will discover a new system field named "Additional Emails."
- This feature enables users to map all their extra emails.
- During the import process, it's necessary to include all additional emails in one column. These should be separated by commas (,), slashes (/), or semicolons (;), and then mapped to the "Additional Emails" field in the system.

Sample CSV



First Name	Last Name	Business Name	Phone	Email	Additional Emails
Ansh	Nagrath	GoHighLevel	+919999999992	anshnrath@gmail.com	anshnrath+add@gmail.com, anshnrath+sub@gmail.com, anshnrath+div@gmail.com
Amith	Ka	GoHighLevel	+919999999991	amithka@gmaill.com	amithka+add@gmaill.com, amithka+div@gmaill.com, amithka+sub@gmaill.com
Madhu	Vana	GoHighLevel	+919999999993	madhuvana@gmail.com	madhuvana+add@gmail.com, madhuvana+div@gmail.com, madhuvana+sub@gmail.com
Yogesh	Bangkok	GoHighLevel	+919999999994	yogeshbangkok@gmial.com	yogeshbangkok+add@gmial.com, yogeshbangkok+sub@gmial.com, yogeshbangkok+div@gmial.com
Puru	Test	GoHighLevel	+919999999995	purutest@gmail.com	purutest+add@gmail.com, purutest+sub@gmail.com, purutest+div@gmail.com
Random	Test	GoHighLevel	+919999999996	randomtest@gmail.com	randomtest+div@gmail.com, randomtest+sub@gmail.com, randomtest+add@gmail.com
Shrikanth	Two	GoHighLevel	+919999999997	shrikanthone@gmail.com	shrikanthone+add@gmail.com, shrikanthone+sub@gmail.com, shrikanthone+div@gmail.com
Utkarsh	One	GoHighLevel	+919999999998	utkarshone@gmial.com	utkarshone+add@gmial.com, utkarshone+sub@gmial.com, utkarshone+div@gmial.com
Test	Yogesh	GoHighLevel	+919999999999	yogibab@gmail.com	yogibab+add@gmail.com, yogibab+sub@gmail.com, yogibab+div@gmail.com, yogibabaaa@gmail.com

FAQ

My CSV list is mixed; some contacts 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 mixed CSV. 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 can also upload them!

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 incompatible with GHL. The parenthesis '()' and dashes '-' make it incompatible. We have to highlight the entire column in the CSV file and ensure it is numbered in, 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':

Add a country code for numbers outside the sub-account country when importing numbers

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If the sub-account country is set to the **US**, you **won't need** to add a **+1** (US country code) to the imported phone numbers. However, if

you're importing numbers outside of the US

, you will need to add the **country code**

I.e. A sub-account that has set its business location to the **US** would need to add**'+44**to call the UK. If the Sub-Accounts country is set to a different country other than the **US** (like - the UK, Australia, etc.), to call/SMS US numbers you would need to add a **'+1 to the country's area code within 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 want to DND for specific channels, please set up a workflow first and use tags for each channel.

Ie: 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 cannot 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. Please use the large text custom field if you have more than one note or more characters than the allowed amount.

I'm trying to export a CSV with Notes.

As of now, We do not have any limit for CSV import for notes, and As per our current export behavior, we support Max of 255 Characters for the last note.

Please note:

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

Smart Lists are innovative contact lists that allow users to customize and filter contacts based on specific conditions, such as custom fields. You can select which columns to display, and the Smart Lists update in real-time as contact data changes. Moreover, they've been enhanced with advanced conditions that allow the inclusion of contacts added between the time an Email campaign is scheduled and when it's sent out, making it a dynamic and flexible tool for effective campaign management.