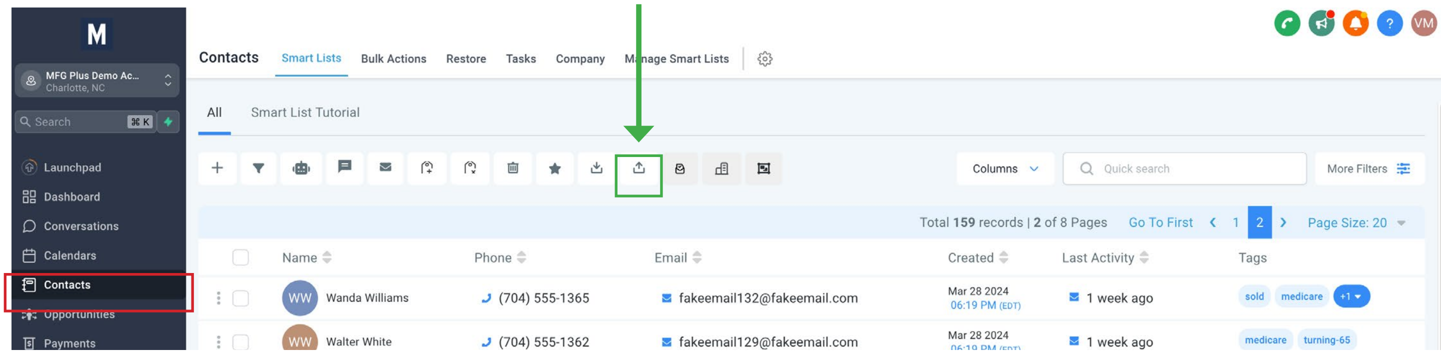
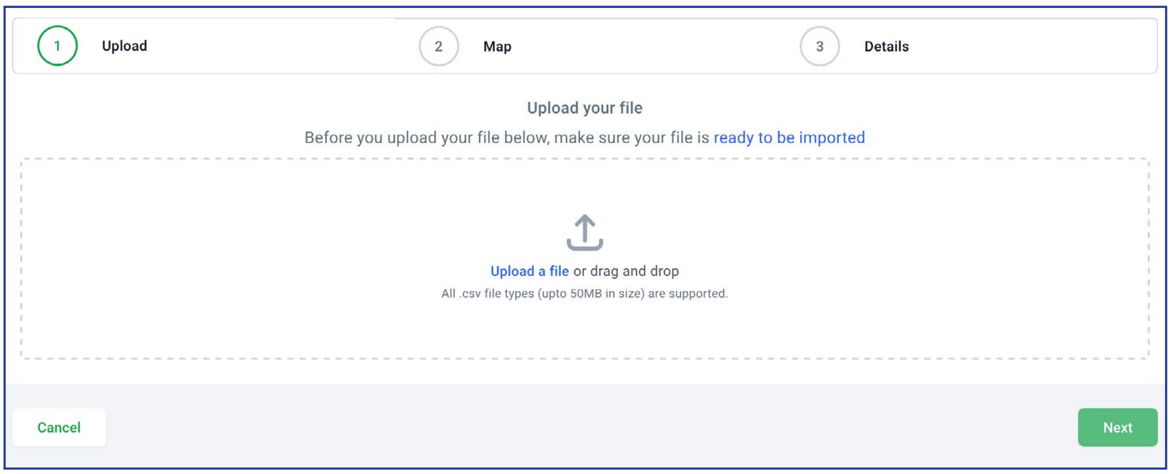
How to Upload Contacts in Bulk



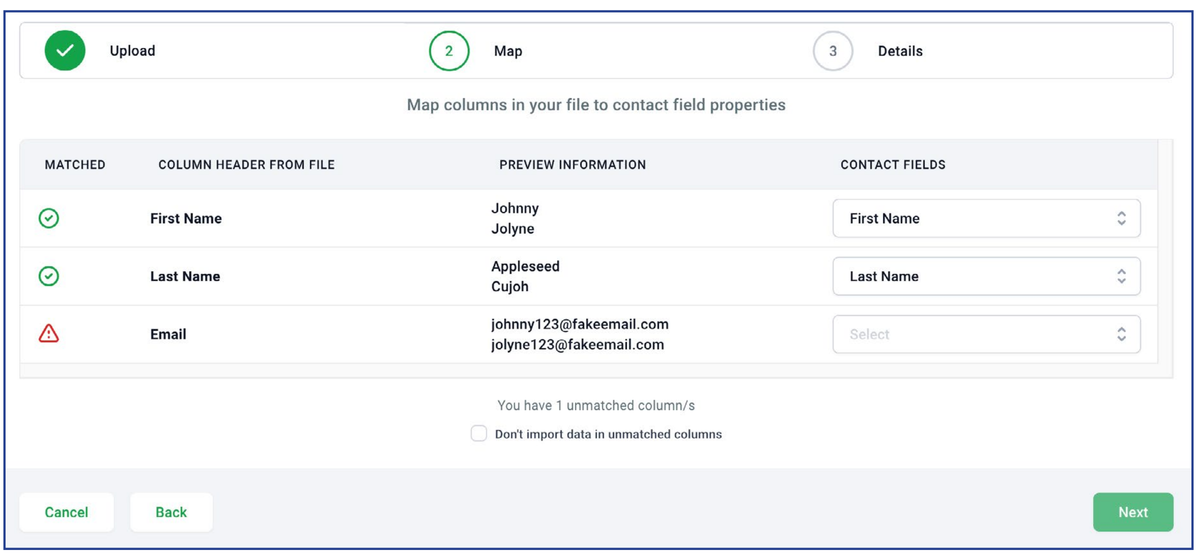
1. Navigate to the **Contacts** tab (highlighted above in red).

2. Click the “Import Contacts button.” It looks like an arrow pointing out of a tray, and is 11th in line of the small white buttons above the column names (highlighted above in green).



If your spreadsheet isn’t saved as a .csv, you can convert it by opening it in Excel or Google Sheets, and Saving As a .csv. **Only .csv files work, so you must convert your file.**

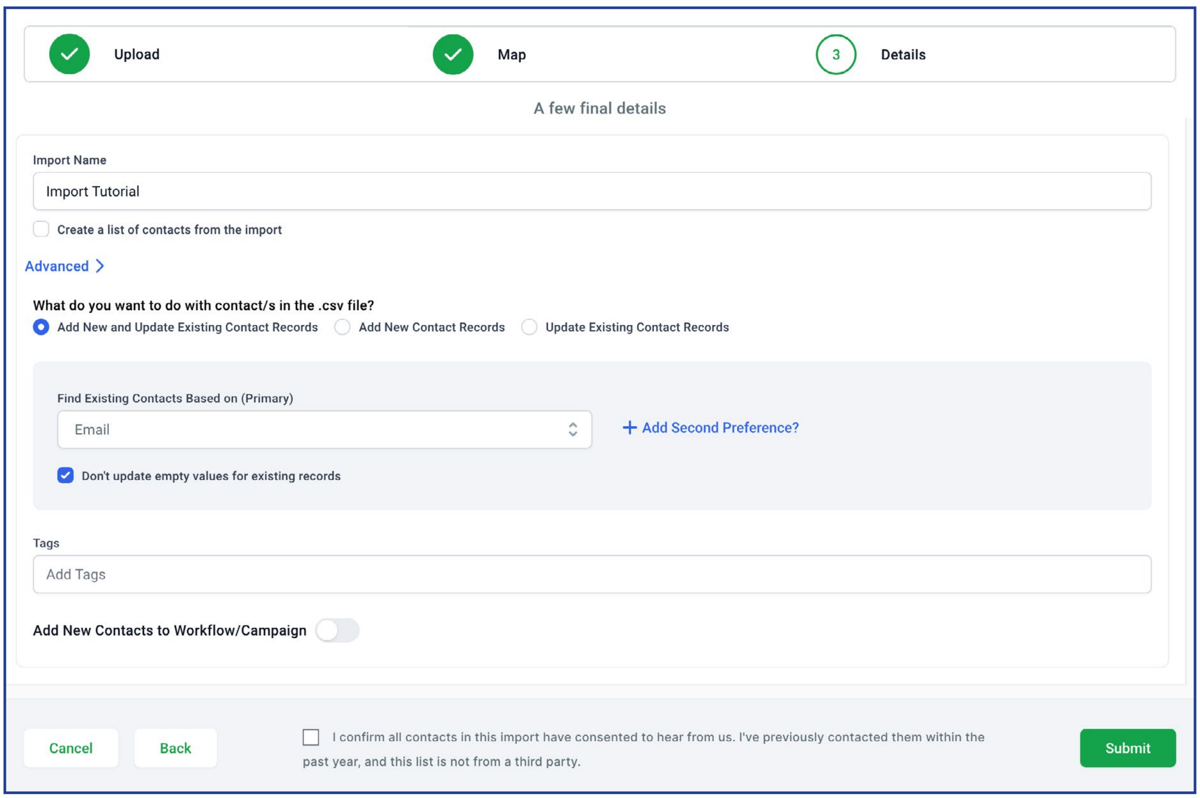
3. A popup will appear, as shown above. Either drag and drop your .csv file into the dotted line box, or click **Upload a file** and choose the .csv you wish to use, then click **Next.**



4. Next, check that your columns are matched to the right contact fields. If they are unmatched or matched incorrectly, choose the correct field by clicking the selector on the right, under **Contact Fields**. To leave unmatched information out, click the checkbox in the bottom middle, labeled **Don’t import data in unmatched columns.** Click next.

5. Name the import. or leave it as the date. To save the list of contacts as a Smart list, check the **Create a list of contacts from the import** box. Confirm that all contacts have consented to hear from you, then click **Submit.** Contacts may take a few minutes to appear. You can check the progress by going to the **Bulk Actions** tab in the **Contacts** section.

6. For more options, click **Advanced** before submitting.



If you mistakenly upload two copies of the same contact, you can select both on the contacts page and merge them using the final of the small white buttons above the contact columns.

a. **What do you want to do with contact/s in the .csv file?**
   - **Add New and Update Existing Contact Records** - Both add contacts and update pre-existing contacts.
   - **Add New Contacts** - Only add new contacts, and ignore contacts that already exist.
   - **Update Existing Contacts** - Only update existing contacts and ignore new contacts.

b. **Find Existing Contacts Based on (Primary)** - Choose between Email and Phone. Plus will use the provided email address or phone to match the uploaded contacts to any pre-existing contacts. If they don't match, the uploaded contact will be treated as a new contact. You can add a second preference by clicking + Add Second Preference?, which will allow Plus to search for the second preference if the first preference doesn't match any contacts.

   c. **Don't update empty values for existing records** - Leave this checked to protect contacts that already exist in Plus. Un-checking it allows empty slots on the .csv to override and erase the existing data in your contacts.

   d. **Tags** - Add any tags you would like to apply to the list of contacts.

   e. **Add New Contacts to Workflow/Campaign** - Choose a workflow to add the list of contacts to.

7. Confirm that the contacts have given consent to be contacted, then click **Submit**. Contacts may take a few minutes to appear. You can check the progress by going to the **Bulk Actions** tab in the **Contacts** section.