



# Import Contacts

Adding each contact manually would not only be a time consuming process but also a tedious one. That is where the ability to import your contacts using a spreadsheet file will come in handy. Zoho Marketing Automation allows you to import contacts you have sourced from various platforms. You can import either from cloud or your computer.

ⓘ Text files are not supported for contact import.

You can import contacts using these common spreadsheet formats:

- **.xls, .xlsx** (Excel documents)
- **.csv** (Comma separated values)

## How should the excel files be?

- Each record should be stored in a single row with its fields in different columns.

## “ Tips to remember while importing the excel files:

- Column headers should not exceed 255 characters.
- File size should not exceed 30 MB.
- Avoid using hyperlinks in email addresses.
- Add email addresses under the appropriate column headers only.
- When saving an Excel file, the format should be saved as MS Excel 95 or later.
- When importing an Excel file, make sure to keep contacts on one sheet.
- Unexpected errors may occur if an XLS file contains any special controls, combo filters, or images embedded within it.
- Checkbox field value should be true or false.
- Date values must be in mm/dd/yyyy format. Dates in any other format will be ignored.
- DateTime values must be in mm/dd/yyyy hh:mm:ss format. Date Time values in any other format will be ignored.
- By default, character encoding is UTF-8 (Unicode). Make sure you provide the correct character encoding if your import file requires a different character code.
- We recommend that you test your import with a sample file before you import the actual data.
- Though we support Excel files, there is a possibility that it may not work due to other unknown errors. If this happens, we suggest converting your Excel file to a .CSV file and trying the import again.

## How should the CSV file be?

- It is important that a CSV file must have one record per line. Otherwise, the system will not accept your file.
- Make sure the fields are separated by commas. When two fields are not separated by a comma, the file will not be imported.



### Problems that can arise while importing contacts:

- **Missing “@” symbol** – For example, "jane.doegmail.com" is missing the “@” symbol.
- **Missing "."** – For example, "Patrick@yahoocom" is missing the period.
- **Spacing in File** – This could be due to the extra space present at the beginning of your list. The best way to prevent this error is to make use of the [TRIM](#) function to remove all spaces from the text.
- **Email address with more than 6 characters after the last dot** — For example, [jane.doe@zylker.incostica](#)
- **Non-English characters**

## Subscription Type

Subscription Type can be used to identify the current stand of contacts to decide if it is the right time to send them email campaigns, as well as whether they want to receive email campaigns. There are three types:

- **Marketing:** These contacts are ready to receive email campaigns and they have shown their interest in receiving email campaigns or expressed explicit consent to receive campaigns.
- **Non-marketing:** These customers have not subscribed to receive email campaigns.
- **Unsubscribed:** These contacts are no longer interested in receiving email campaigns. You can also manually add contacts to the Unsubscribed subscription type. You can retrieve or reactivate these contacts if required.

**Note:** You can only change the subscription type from unsubscribed to marketing or non-marketing for the contacts added by you. You cannot change the subscription type for those contacts who have unsubscribed on their own unless they resubscribe.

## How to import contacts from files in your system/computer?

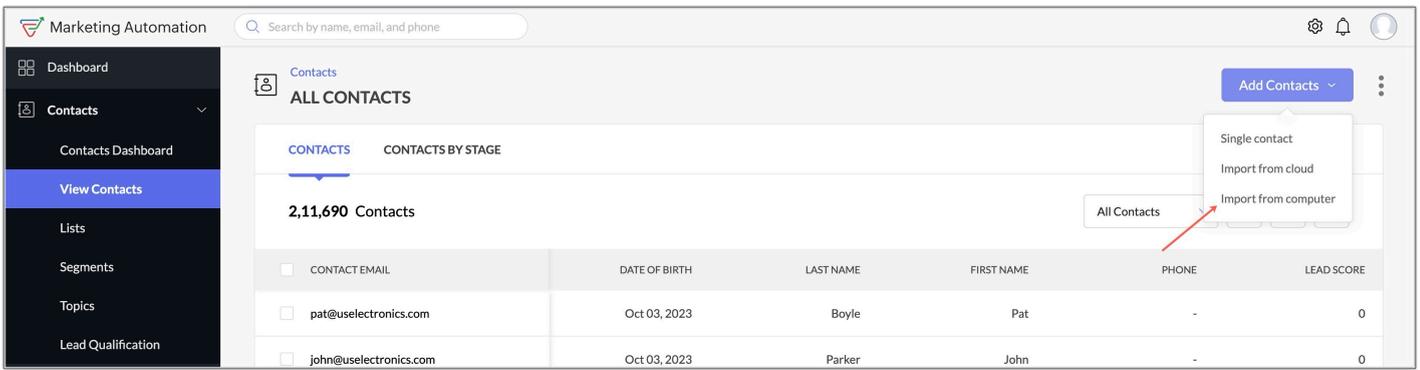
The screenshot displays the Zoho CRM dashboard for a user named Patricia. The dashboard includes a navigation sidebar on the left with options like Dashboard, Contacts, Lead Generation, Journeys, Marketing Planner, Marketing Campaigns, Website Analytics, and Library. The main content area shows a summary of contact counts and a detailed lifecycle stage funnel.

Stage	Count
Contact Captured	1
Raw leads	1
Marketing ready	0
Marketing qualified	0
Sales ready	0

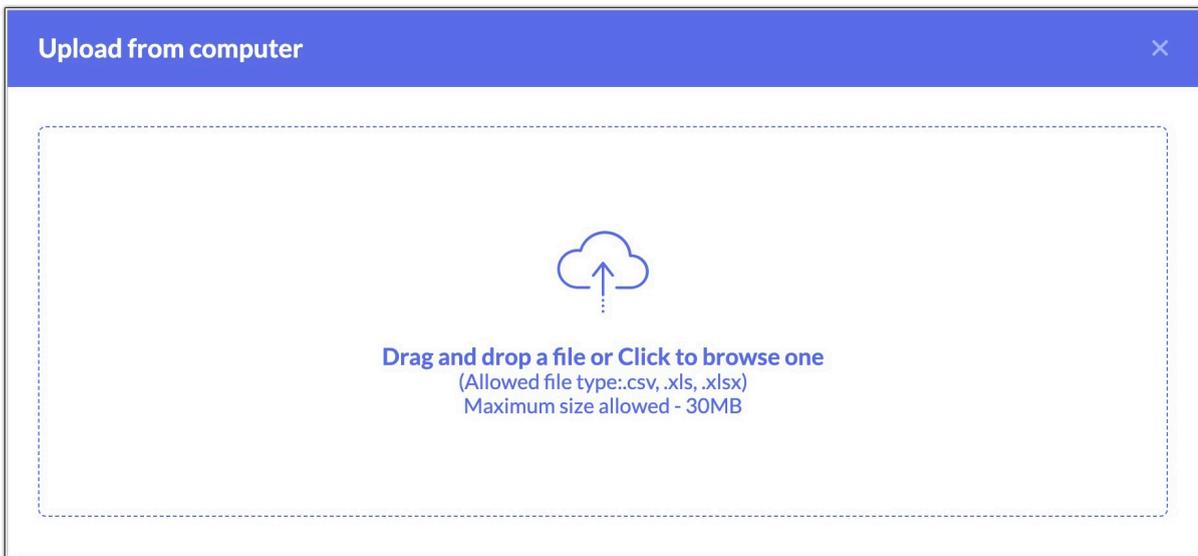
  

Stage	Next stage conversion	Average conversion time	Average engagements
Raw leads	0%	0 Days	0
Marketing ready	0%	0 Days	0
Marketing engaged	0%	0 Days	0
Marketing qualified	0%	0 Days	0
Sales ready	0%	0 Days	0

1. From the *Navigation Toolbar* to the left, select **View Contacts** under **Contacts** menu.
2. Click on **Add Contacts**.
3. Select **Import from computer** under Add Contacts menu.



4. In the given space, you can either drag and drop a file or click inside it to select a file from the desired location in your computer and click **Upload**.



5. Check for the correct mapping of fields in the slide-in that appeared. You can also **map fields** manually.
6. Select the **Subscription type** under the Subscription details. If you have chosen the subscription type as Marketing, choose a [topic](#) the contact might be interested in.
7. Select a **Contact source** and a **List** the contact should be imported to. These data are optional.
8. Click **Import**.

Import from computer
✕

✔ Denotes the auto mapped field

FILE FIELDS	ZOHO MARKETING AUTOMATION FIELDS	SAMPLE DATA FROM FILE
First name(Col : 0)	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">                     First Name <span style="float: right;">▼</span> </div> <span style="color: green; font-weight: bold; margin-left: 10px;">✔</span>	John
Email address(Col : 1)	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">                     Contact Email <span style="float: right;">▼</span> </div> <span style="color: green; font-weight: bold; margin-left: 10px;">✔</span>	john.doe@gmail.com

### Subscription details

**Subscription type\***

Marketing ▼

**Topics** ⓘ

Zoho CRM > Marketing ▼

**Lawful basis for communication\***

Consent ▼

**ADDITIONAL DATA** (Optional)

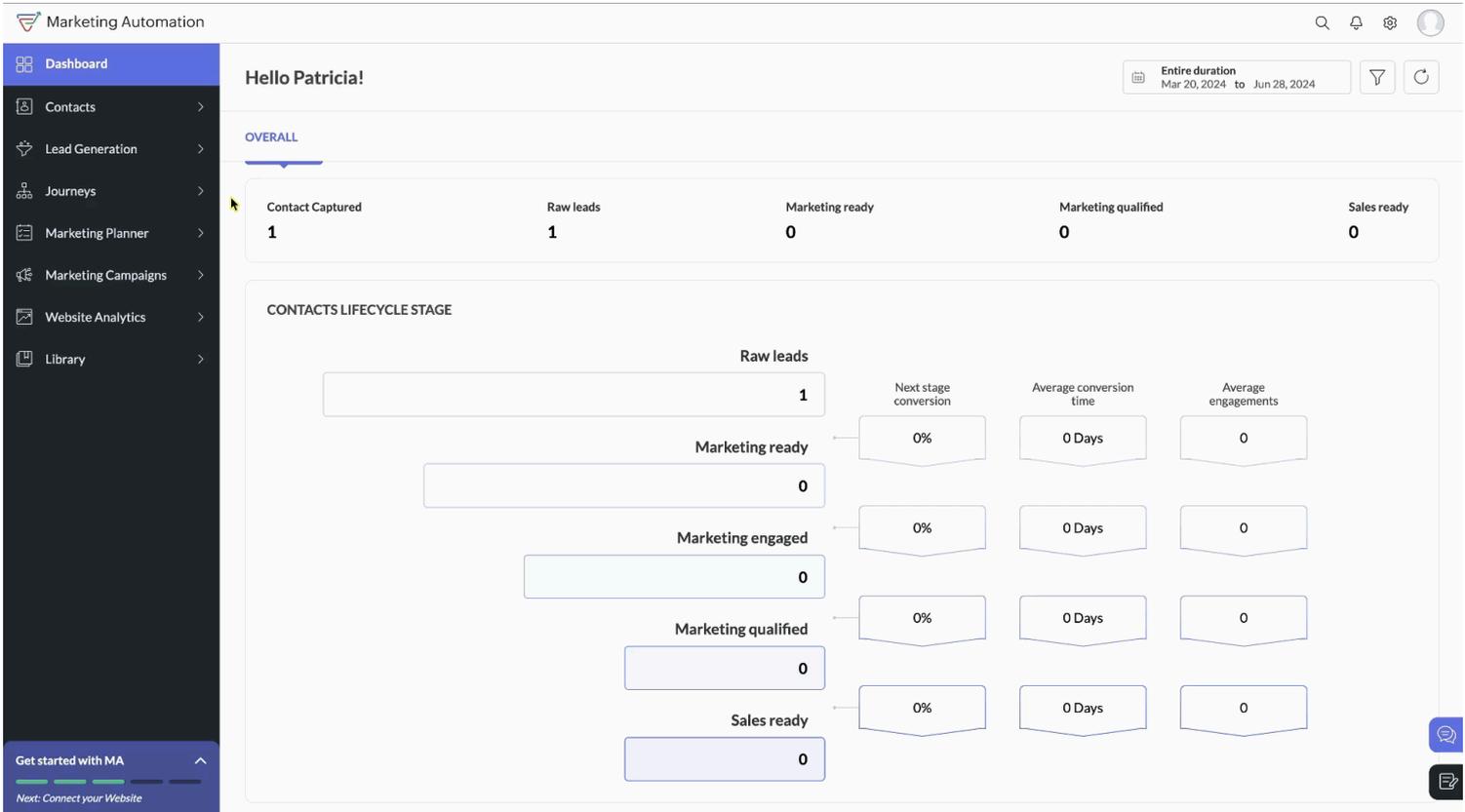
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Import

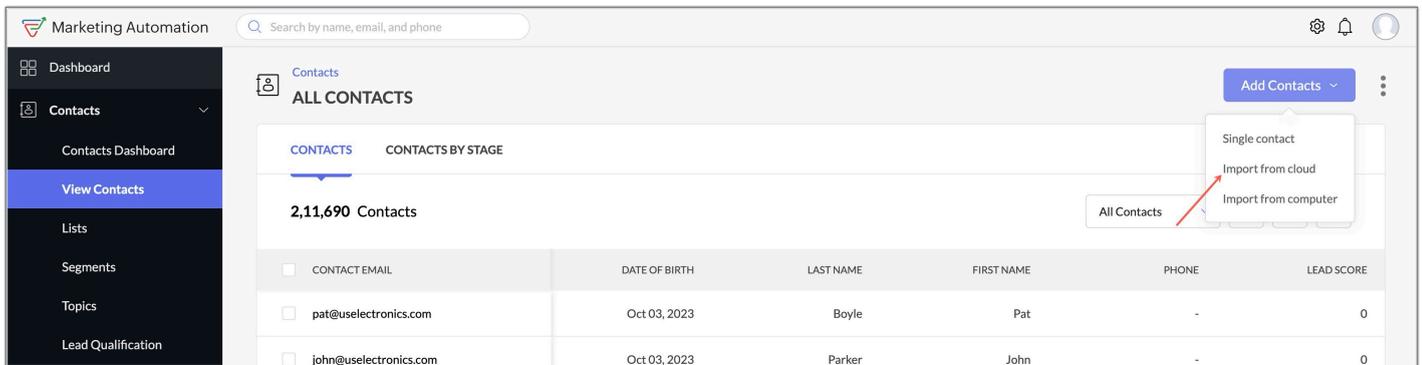
Cancel

9. The Import process will begin and you will be notified when it's complete.

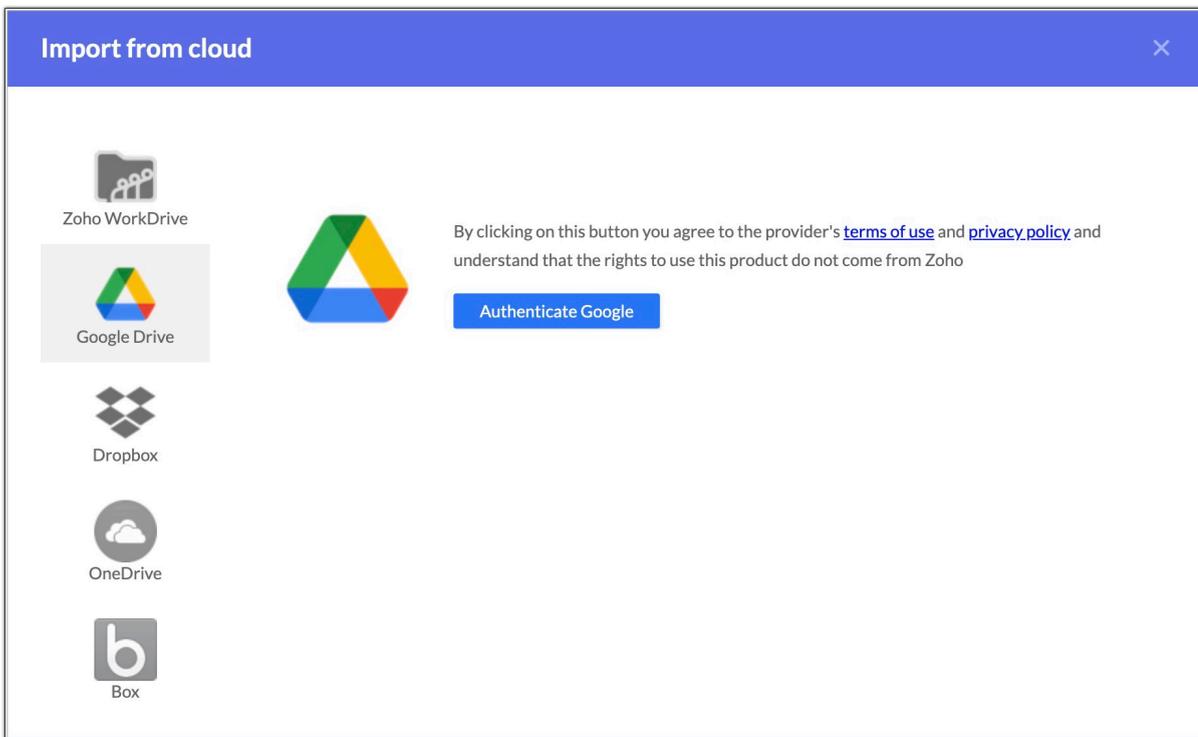
## How to import contacts from files stored in the cloud?



1. From the *Navigation Toolbar* to the left, select **View Contacts** under **Contacts** menu.
2. Click on **Add Contacts**.
3. Select **Import from cloud** under Add Contacts menu.



4. Select a **cloud drive** and choose a contact **file** to import. You can choose from Zoho Workdrive, Google Drive, Dropbox, OneDrive. You have to authenticate the chosen drive before you can proceed with the import.



5. Check for the correct mapping of fields in the slide-in that appeared. You can also **map fields** manually.
6. Select the **Subscription type** under the Subscription details. If you have chosen the subscription type as Marketing, choose a [topic](#) the contact might be interested in.
7. Select a **Contact source** and a **List** the contact should be imported to. These data are optional.
8. Click **Import**.

**Import from cloud** ✕

Import contacts > gdrive  
File to import from : [Contacts.xlsx](#) [Change](#)

✔ Denotes the auto mapped field

FILE FIELDS	ZOHO MARKETING AUTOMATION FIELDS	SAMPLE DATA FROM FILE
First name(Col : 0)	First Name <span style="float: right;">✔</span>	John
Email address(Col : 1)	Contact Email <span style="float: right;">✔</span>	john.doe@gmail.com

**Subscription details**

Subscription type\*

Topics ⓘ

Lawful basis for communication\*

**ADDITIONAL DATA** (Optional)  
Add to a list

Import
Cancel

9. The Import process will begin and you'll be notified when it's complete.

## Updating the subscription type of existing contacts

You can update the subscription type of existing contacts via import (both by cloud and computer).

Consider you have 500 contacts in your import file, out of which 200 contacts are already present in your Zoho Marketing Automation account. But for these 200 contacts, you want to change the subscription type from Non-marketing to Marketing. In such scenarios, instead of updating the subscription type of these contacts manually, you can do it during the import thereby providing you a faster and smoother process. After you've chosen the file for import either from your computer or from a cloud service, you can tick the **Update subscription type for existing contacts** checkbox.

✕
Import from computer

Import contacts from : [Sample Contacts.csv \(Change\)](#)

### Subscription details

**Subscription type\***

Marketing
▼

**Topics** ⓘ

Zylker > Marketing
▼

**Lawful basis for communication\***

Consent
▼

Update subscription type for existing contacts

Once the import process is completed, the existing subscription type for those 200 contacts will be overwritten.

## Import Summary

Import Summary is the page that appears after your contacts get imported. This page will show the summary of your imports including details like the number of records newly added, skipped, updated.

Contacts > [View Contacts](#)
Add Contacts ▼

### IMPORT SUMMARY

**10 files imported** What are you searching for?

FILE NAME	TOTAL RECORDS	NEWLY ADDED ⓘ	UPDATED ⓘ	SKIPPED ⓘ	
Created on May 28, 2024 at 06:05 AM by Patricia Boyle					
<b>Sample Contacts.csv</b> Created on May 28, 2024 at 04:47 AM by Patricia Boyle	4	4	0	0	⋮
<b>Sample Contacts.csv</b> Created on May 28, 2024 at 04:29 AM by Patricia Boyle	10	9	1	0	⋮
<b>Sample Contacts.csv</b> Created on May 28, 2024 at 03:42 AM by Patricia Boyle	3	0	0	2	⋮
<b>Sample Contacts.csv</b> Created on May 28, 2024 at 01:34 AM by Patricia Boyle	3	1	0	2	⋮

**Total Records** - The number of records present in the file that you just imported.

**Newly Added** - The number of records that have been newly added to your Zoho Marketing Automation account after the successful import.

**Updated** - The number of existing records in your Zoho Marketing Automation account that have been updated or overwritten with new information.

**Skipped** - The number of records that were not imported due to various reasons mentioned [here](#).

When you click on the More Actions button at far right of an import summary, you can download the list of newly added and/or skipped contacts. If no records were added, updated, or skipped for an import, this button will not appear for that particular import summary.

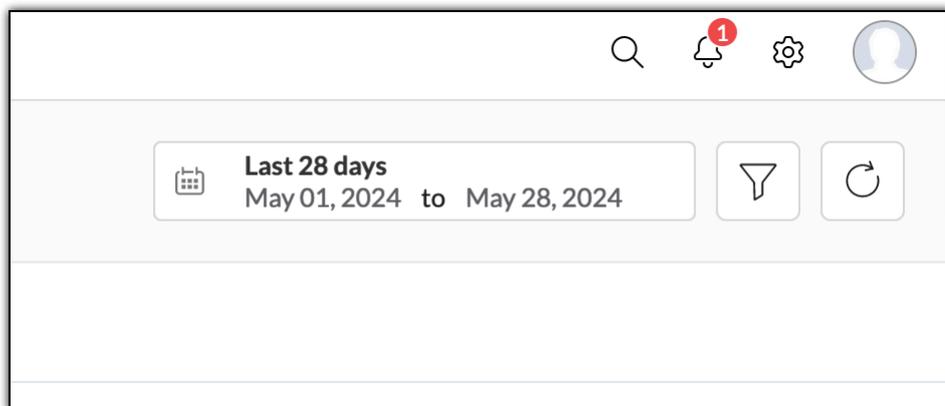
<b>Sample Contacts.csv</b> Created on May 28, 2024 at 01:34 AM by Patricia Boyle	3	1	0	2	 Download added contacts Download skipped contacts
<b>contaacts.csv</b> Created on Apr 21, 2024 at 11:37 PM by Patricia Boyle	5	0	4	1	

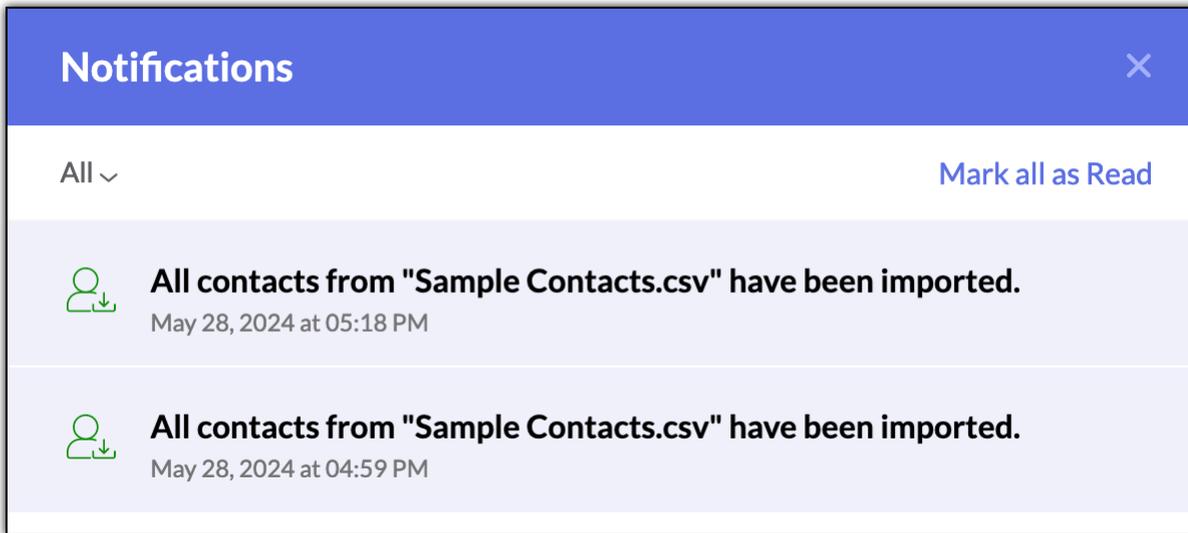
It is also possible to access the Import Summary page in two other ways:

1. You can go to **Contacts** from *Navigation Toolbar* and select **View Contacts**. Click on the *More Actions* button at top right next to **Add Contacts** button and choose **Import Summary**.



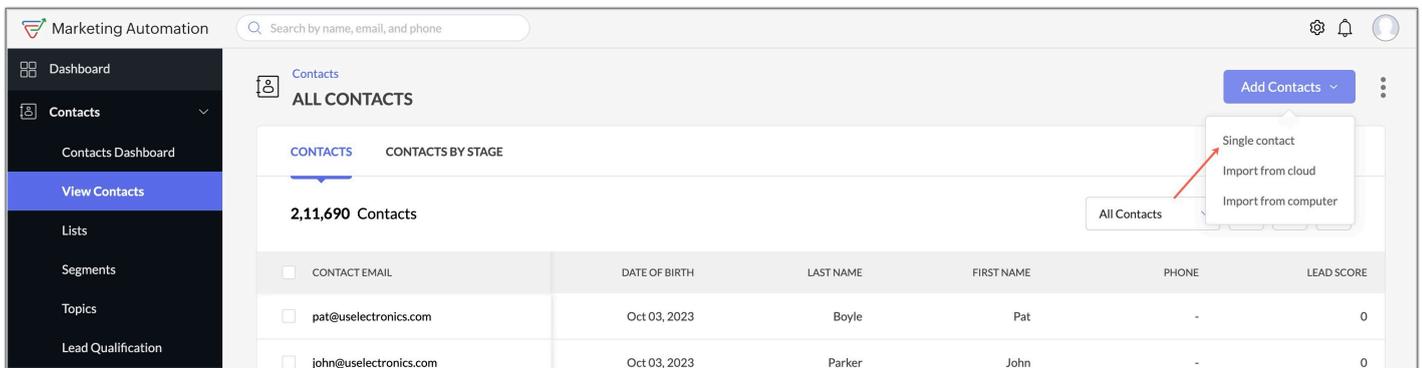
2. You can click on the bell icon at top right of your Zoho Marketing Automation account. Choose the notification related to the import summary. This will take you to the import summary page.





## How to add a single contact?

1. From the *Navigation Toolbar* to the left, select **View Contacts** under **Contacts** menu.
2. Click on **Add Contacts**.
3. Select **Single Contact** under Add Contacts menu.



4. Fill in the basic contact information like **First name, Last name, Email address, Title, Mobile**, etc. Either the Email address or last name or contact number should be filled to add a contact.
5. Select the Subscription type under the Subscription details,
  - If you have chosen the **Subscription type** as Marketing, choose a [topic](#) the contact might be interested in.
  - Select a **lawful mode of communication** if your organization is [compliant with GDPR](#).
6. Scroll to fill in optional data. Select a **Contact source** and a **List** the contact should be imported to.
7. Click **Save and New** or **Save and Close**.

## Single contact



### Contact Data

Email address

patricia@zylker.com

Salutation

Ms

First name

Patricia

Last name

Boyle

Mobile

+-----

### Subscription Details

Subscription type\*

Marketing

Topics ⓘ

Zoho CRM > Newsletter

Lawful basis for communication\*

Consent

Save and New

Save and Close