



ESP Quick Tip #70: Import an Email Marketing List

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To import a contact list, click on the Import File button. Select the format of the file you want to import. The file must contain a contact first name, contact last name, and email address.

Note: If you are using a CSV format, make sure the first row contains a header for each column.

The screenshot shows a dark blue header with the 'esp' logo and the text 'Campaign List 2020'. Below the header, there is a section titled 'Select a File Format'. This section contains five buttons arranged in a grid: 'CSV', 'IIF', 'vCard', 'Outlook', and 'Google'.

After you click on a file format, click on the Browse button to navigate to the file on your computer. Select the file, click on open, and then click on the Upload button.

The screenshot shows a dialog box with a dark blue header and a close button (X) in the top right corner. The main content area has the title 'Upload your Contacts from a single CSV file' and the instruction 'Please make sure each column in your CSV contains a heading.' Below this, there is a checked checkbox labeled 'Check file for conflicts before importing into CRM'. At the bottom, there is a file selection interface with an 'Upload File' input field, a 'Browse' button (highlighted with a blue arrow), and an 'Upload' button.

Map the fields from the file using the available options for company and contact information. The system will sometimes assign an option for a field, but you may also have to map some fields.

The first screenshot shows the 'Email' mapping step. It features a dropdown menu with 'Entity', 'Resource', 'Suggestions', and 'Skip' options. Below are three input fields: 'Contact Home Email', 'Contact Work Email', and 'Contact Other Email'. A table below shows the mapping of these fields to the 'Email' system field:

Email
jdoe1@abc.com
jdoe2@abc.com
jdoe3@abc.com

The second screenshot shows the 'Title' mapping step. It features a dropdown menu with 'Entity', 'Resource', and 'Skip' options. Below is a dropdown menu labeled 'Select a field to import to...'. A table below shows the mapping of 'Contact Title' to the 'Title' system field:

Title
CEO
COO
President

The third screenshot shows the 'Phone' mapping step. It features a dropdown menu with 'Entity', 'Resource', 'Suggestions', and 'Skip' options. Below are seven input fields: 'Contact Home Phone', 'Contact Home Fax Phone', 'Contact Mobile Phone', 'Contact Office Phone', 'Contact Office Fax Phone', 'Contact Other Phone', and 'Contact Orders Fax Phone'. A table below shows the mapping of these fields to the 'Phone' system field:

Phone
555-555-5555
555-555-5555
555-555-5557

If there is a field in the uploaded file which you do not want to map, click on the Skip option.

The first screenshot shows the 'User Id' mapping step. It features a dropdown menu with 'Entity', 'Resource', and 'Skip' options. Below is a dropdown menu labeled 'Select a field to import to...'. A table below shows the mapping of 'Contact ID' to the 'User Id' system field:

User Id

The second screenshot shows the 'First Name' mapping step. It features a dropdown menu with 'Entity', 'Resource', and 'Skip' options. Below is a dropdown menu labeled 'Select a field to import to...'. A table below shows the mapping of 'Contact First Name' to the 'First Name' system field:

First Name
John
Jane
Jennifer

The third screenshot shows the 'Last Name' mapping step. It features a dropdown menu with 'Entity', 'Resource', and 'Skip' options. Below is a dropdown menu labeled 'Select a field to import to...'. A table below shows the mapping of 'Contact Last Name' to the 'Last Name' system field:

Last Name
Doe
Doe
Doe

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