

Essential Steps to Import Contacts Successfully

Introduction

Moving your list from Mailchimp, ActiveCampaign, ConvertKit, or a spreadsheet into systeme.io is more than clicking **Import contacts**. A bad import—duplicates, invalid emails, reactivated unsubscribes, or lists without consent—can trigger **blocks**, hurt **deliverability**, and fail **GDPR** checks. Official help article **4346** outlines preparation, cleaning, segmentation, and safe import.

This guide walks through those steps plus the technical flow from article **238** (CSV, delimiter, column mapping).



Step 1 — Preparation and Audit

Before export:

- **Export** from your old autoresponder as **CSV**.
- **Review fields**: email, first name, last name, status (subscribed/unsubscribed), signup date, tags, last email sent, engagement.

- **Document consent:** keep opt-in proof (form logs, timestamps)— systeme.io may request it.
- **Plan migration timing** with [deliverability-safe migration](#) (article 4345).

Step 2 — Clean Your List Before Importing

Import **only cleaned files**:

- Remove **duplicates**.
- Remove **invalid** or typo addresses.
- Remove or flag **inactive** contacts (no opens/clicks in a long period)—consider a re-permission campaign first.
- Use your old tool's **filters** to export subscribed vs unsubscribed separately if needed.
- Enable **invalid email detection** during import when offered.

Do not import purchased lists, scraped emails, or contacts without permission—accounts can be **blocked**.

Step 3 — Importing Students (Course Contacts)

If contacts are **course students**, treat them as a distinct segment:

- Export from your LMS or previous platform with email + name.
- Tag imports (e.g. course-alumni) for automations and access rules.
- Do not auto-subscribe them to marketing blasts unless they opted in to marketing separately from course access.

Step 4 — Segment and Tag Strategy

Segmentation protects reputation and clarity:

1. Create a **tag** before import (e.g. import-mailchimp-2026) under **Contacts** → **Tags**.
2. Import one logical batch per tag (customers, leads, webinar attendees).
3. After import, filter by tag to **verify count** vs source export.
4. Use tags in **automations** instead of emailing the whole database at once.

Step 5 — Prepare the CSV File

1. First row = **headers** (email, first_name, last_name, etc.).
2. From Excel: **File** → **Save As** → **CSV (Comma delimited)**.
3. One email per row; no blank email column.

4. UTF-8 encoding if names use accents.
5. Remove extra columns you will not map (reduces errors).

Step 6 — Import in systeme.io

1. Open **Contacts** (CRM) → **Import contacts**.
2. Upload CSV (drag-and-drop or file picker).
3. Choose **delimiter** (usually **comma**).
4. **Map columns**: match file headers to systeme.io fields—**Email** is required.
5. Select **tag(s)** for this batch.
6. Optional: **Campaign** dropdown to enroll in a sequence—see [subscribe on import](#) (article 1062) and map last-sent step/date if migrating mid-campaign.
7. Review consent checkbox / warnings.
8. Click **Import**.

Rule: Only import people who **explicitly consented** to receive your emails (article 238).

Step 7 — Respect Contact Status

- **Unsubscribed** contacts may be imported with unsubscribed status—they must **not** be emailed again without new consent.
- Do **not reactivate** inactive or unsubscribed users as “subscribed” to inflate list size.
- Map status column if your export includes it.

Step 8 — Verify After Import

1. **Contacts** → filter by import **tag** → compare total to CSV row count.
2. Spot-check names and emails.
3. Send a **small test segment** before a full broadcast.
4. Watch bounce rate on first campaign.
5. Keep **import logs** and consent records.

Legal and GDPR Essentials

- Lawful basis for marketing (consent or legitimate interest where applicable—consult your jurisdiction).
- Update **privacy policy** if processing changes.
- Inform users if required when moving platforms.
- Do not reuse the list for unrelated purposes.

- Honor **unsubscribe** and deletion requests promptly on systeme.io.

Common Mistakes to Avoid

Mistake	Consequence
Importing bought lists	Account block, spam complaints
Wrong delimiter (semicolon vs comma)	Broken mapping, one-column mess
No email column mapped	Import fails or skips rows
Auto-enroll cold list in aggressive campaign	Spam folder, domain damage
Skipping tags	Cannot audit migration batch

Frequently Asked Questions

CSV only?

Yes—convert Excel to CSV first.

Purchased lists?

Not allowed.

Unsubscribes?

Import with unsubscribed status; do not mail them.

Tags?

Create before import; assign during import.

Campaign on import?

Optional; map extra columns for sequence position.

Related Resources

- [How to Import or Export a Contact List](#)
- [How to Migrate Without Hurting Your Email Deliverability](#)
- [How to Manually Clean Your Email List](#)
- [How to Subscribe Contacts to a Campaign When Importing](#)

Import into systeme.io with **clean data, clear tags, and proven consent**—not raw volume.

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