

Migration of Your Contact List to systeme.io: What You Need to Know Before Getting Started (Advanced Tips)



Introduction

Importing contacts looks like a five-minute CSV upload—but **one bad import** can poison deliverability, break automations, or blow past plan limits on [systeme.io](#). This advanced guide goes beyond basics: audit, segmentation, custom fields, API options, warming, and verification—aligned with [Migration of your contact list to systeme.io: what you need to know before getting started \(advanced tips\)](#) and [How to migrate without hurting your email deliverability?](#)

Use this page whether you DIY-import from Mailchimp, Kajabi, Kartra, ActiveCampaign, or hand a cleaned file to the free migration team.

Pre-Flight: Audit Before You Export

From your current tool, export **CSV** and inventory:

- Total subscribed vs unsubscribed vs inactive
- Tags, lists, or segments you rely on in automations
- Custom fields (company, phone, course ID, etc.)
- Recent engagement (opens/clicks in last 30–90 days)
- Proof of opt-in for compliance checks

Clean before import (same rules as [Essential steps to import contacts successfully](#)):

- Remove duplicates, invalid emails, and long-dead addresses
- Never import bought or scraped lists ([How to improve your email deliverability](#))
- Do **not** reactivate unsubscribed users as subscribed
- Segment: consider **multiple smaller imports** (engaged first, cold later or never)

Check your target plan **contact cap** before importing—overflow forces upgrades or deletions ([pricing](#)).

Recreate Tags, Segments, and Custom Fields

First

systeme.io organizes audiences with **tags**, not legacy “lists.” Before import:

1. Document every tag/segment from your old ESP
2. Create matching tags in CRM → Tags ([How to create a tag](#))
3. Plan tag strategy—lower plans have **limited tag counts**; consolidate if needed (e.g. one tag per product line vs per cohort)
4. Create **custom contact fields** you will map from CSV ([How to add a custom form input field](#))

Advanced segmentation after import: combine tags with behavior (purchases, funnel steps, course progress) for dynamic audiences and targeted newsletters—tags are the foundation for automations and broadcasts.

Unsubscribed contacts *can* be imported with **unsubscribed** status; they will not receive email through the platform.

CSV Format and Delimiters

- Save Excel as **CSV UTF-8** (File → Save As → CSV)
- One row per contact; **email column required**

- Supported delimiters: **comma**, **semicolon**, or **pipe**—match what you select in the importer
- Header row with clear names: email, first_name, last_name, tags, etc.
- If tags are in one column, confirm format your mapper expects (single tag on import UI vs multiple tags via API)

Full UI walkthrough: [How to import or export a contact list](#).

Import Workflow in systeme.io

1. **CRM** → **Contacts** → **Import contacts**
2. Choose **CSV delimiter**
3. Upload file
4. Optionally assign an **import tag** (e.g. import-mailchimp-2026) to isolate this batch
5. Optionally subscribe to a **campaign** during import—only for consented, engaged contacts ([How to subscribe contacts to a campaign when importing a contact list](#))
6. **Map each column** to systeme.io fields (email, first name, custom fields)—never skip the mapping review
7. Complete import and read the **final report** for errors or skipped rows
8. Filter by import tag to verify count vs source system

Export from systeme.io: select contacts → More actions → Export; you receive a CSV link by email (useful for backups before large changes).

Advanced Strategies

Staged imports by engagement

Import **30-day openers** first, warm sending, then broader 60/90-day segments. Keeps complaint rates low during ESP switch ([How to migrate without hurting your email deliverability?](#)).

Tag naming convention

Use prefixes: src-kartra, seg-buyers, course-01-alumni. Easier filters and automation conditions later ([How to automatically and manually add tags to your contacts](#)).

Dynamic segmentation post-migration

After import, build automations that add/remove tags on behavior (purchase, tag click, course completion). Welcome sequences for new import tag; sunset sequences for inactive tagged contacts.

API and integrations (CRM sync)

For ongoing sync from another app (WordPress opt-ins, Teachworks, custom CRM), use the [How to use systeme.io's public API](#) or tools like Zapier/Make: create/update contacts, assign tags—API actions can **trigger automations** defined in systeme.io.

Note: some native integrations (e.g. ActiveCampaign) are **one-way into** the external tool—changes there may not sync back. Plan systeme.io as source of truth after cutover ([How to integrate ActiveCampaign with systeme.io](#)).

Webhooks after opt-in

For real-time contact + tag from external forms, pair webhooks with API tag assignment ([How to create and trigger a webhook after an opt-in or a sale](#)).

Email Warming After Import

Switching ESP = **new sender reputation**. Even with 20,000 contacts, **do not** broadcast to all on day one.

- Authenticate domain first ([How to authenticate your domain name for email sending](#))
- Start with smallest engaged segment
- Increase daily/weekly volume while monitoring bounces and spam rates
- Delay reactivation campaigns for cold segments

This is the #1 advanced step teams skip—and the main cause of post-migration spam folders.

Plan Limits and Housekeeping

- **Contact storage** caps per plan—count before import
- **Tag limits** on entry tiers—merge or upgrade if you tag per class/product heavily
- Delete test imports or use distinct tags so you can bulk-remove mistakes ([How to delete multiple contacts](#))
- Understand tag stats: “Total” on a tag includes historical assignments, not only current holders ([How to create a tag](#))

Free Business Migration vs DIY CSV

On **Unlimited monthly** or **annual** plans, the migration team can import lists and tags as part of platform moves ([How to get a free migration to](#)).

systeme.io). Still provide **clean exports** and document segment logic—you get better results when source data is already audited using this checklist.

Advanced Pre-Import Checklist

- ☐ Subscribed-only export (or unsubscribed mapped correctly)
- ☐ List cleaned and deduped
- ☐ Opt-in proof archived
- ☐ Tags recreated; tag limit checked
- ☐ Custom fields created
- ☐ Plan contact headroom confirmed
- ☐ Domain authentication scheduled before first send
- ☐ Warming schedule written
- ☐ Import tag + verification filter ready
- ☐ Automations updated to use new tags (not old list names)

Frequently Asked Questions

CSV only?

Yes for bulk UI import; API for programmatic creates/updates.

Wrong column mapping?

Fix mapping and re-import subset with import tag—or update via API; always read import report.

Import + immediate campaign?

Possible but risky for cold contacts—prefer engaged segment + warming.

Multiple ESPs into one account?

Yes—use separate import tags per source; watch total contact limit.

Related Resources

- [Migration of your contact list to systeme.io: what you need to know before getting started \(advanced tips\)](#)
- [How to import or export a contact list](#)
- [Essential steps to import contacts successfully](#)
- [How to migrate without hurting your email deliverability?](#)
- [How to get a free migration to systeme.io](#)

Build your CRM on systeme.io with a contact migration done **once**, correctly—tags, fields, warming, and deliverability included.

Last updated: July 11, 2026 · Based on *Migration of your contact list to systeme.io: what you need to know before getting started (advanced tips)*