

Import contacts from a CSV file

Move contacts from a spreadsheet into Clientbase CRM

Clientbase CRM

How-to

Last updated: October 2026

Who this is for

Admins and Managers on the Pro plan or higher.

Before you start

☐ A UTF-8 CSV file with a header row

☐ Up to 10,000 rows and 5 MB

☐ An Email column (required)

TIP

Test with a 10-row file first.

Steps

1. Go to **Settings > Data > Import**.
2. Click **Upload file** and choose `contacts-2026.csv`.
3. Map columns: "E-mail" to **Email**, "Company Name" to **Company**, "Phone #" to **Phone**.
Unmapped columns are skipped.
4. Under **Duplicates**, choose **Update existing contacts by email**.
5. Click **Start import**.

RESULT

A summary reading "1,248 imported, 37 updated, 4 skipped" with a **Download error report** link.

Common errors

ERROR	HOW TO FIX IT
Missing email	Add an email or delete the row.
Invalid date format	Use YYYY-MM-DD.
File too large	Split into files under 5 MB.

Last updated: October 2026