

Import Data

Last Modified on 01/31/2025 7:26 am EST

Import Data lets you bring information into EventsAir from different sources, including Comma-Delimited/Comma Separated Values files (.CSV) and Excel spreadsheets.

You can use this to import contact details for attendees, speakers/presenters, exhibitors etc., even if they haven't registered via your normal process for this event.

NOTE: You can't import registrations directly. But you can create a Package [in Setup] that includes a registration type, and assign it to your newly imported contacts during the Import Data process.

After importing, you can also use Bulk Change Express Action to assign other module items to contacts you've just imported. Presentation module items can't be added here, or via Packages, so if you want to bulk import Speakers, you may need to add a marketing tag and then filter on that to assign a number of people the "Speaker" role within at least one session.

- Using Import Data, you can **add marketing tags**, **link to a Group**, and/or **assign a Package**.
- You can update **existing contacts** AND/OR create **new contacts** (depending on which options you select).

First, you need to create a file to import. **There's no template to download for the Import Data Express Action, because you can create your own version easily.** If you're not sure where to start, you could do a Standard Export of just one contact, just so you can see what columns (and their headings) you might want to include in your import file. Your file can be an Excel spreadsheet or CSV (comma separated values) file you already have (or you can save an Excel spreadsheet as a CSV file). The columns in the file you upload for the data import can be whatever you like, and can be in any order – you just need to match your headings with the correct field in EventsAir where you want the data to go (as instructed below).

1. Press **Browse** to select your import file.
2. You must match specific import fields to the correct field in the EventsAir **Contact** module.
3. Based on the headings in your import file, you'll see a drop-down list of the available fields in EventsAir. Select the correct EventsAir field for each field you want to import.
4. Tick all "Required" boxes. (The report pop-up after the import will tell you how many records were successfully processed and how many failed to process.)

If you don't assign a column/heading in your file to a field in EventsAir, it'll be ignored.

Import Data ✕

Quick Import

New

Edit

Import Data File Example User Export.xlsx ✕

First	First Name	<input type="checkbox"/> Required
Last	Last Name	<input type="checkbox"/> Required
Address	Primary Address - Line One	<input type="checkbox"/> Required
City	Primary Address - City	<input type="checkbox"/> Required
ZIP	Primary Address - Zip/Post	<input type="checkbox"/> Required
EMAIL	Primary Email	<input type="checkbox"/> Required

Add Marketing Tags

Marketing Tag Please select... + Add Marketing Tag

Link to Group

Groups Please select...

Save As Quick Import
Clear
Cancel
Import

Now select any or all of the following:

- Assign one or more Marketing Tags – NB, you can only do this for NEW contacts. Otherwise you'll create duplicate marketing tags.
- Link Contacts to a Group.
- Assign a Package to Contacts.

Matching Contacts fields

- Unless you're importing all new contacts, you should select the appropriate field(s) that you want EventsAir to use to check for duplicates.
- Tick the "Check for Matching Contacts based on" box, and then select one of the below. Options are only available to select if the relevant fields are included in your import:
 - Primary Email Address and Last Name
 - Contact ID and Last Name
 - External ID

Remember, this is assuming your list includes at least some matching contacts:

- If you want any matching records to be skipped over, leave the "Matching Options" blank.
- If you want to update any matching records, select Update Existing.
- If you want any records that don't match to be added, select Add New (no matching records).

When ready, select "Import".

