



[Knowledge Base](#) > [Gym Lead Machine](#) > [Contacts](#) > [Import Contacts via CSV](#)

Import Contacts via CSV

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You can **import contacts via CSV** into Gym Lead Machine to bring your existing contact list into your account in bulk. This article covers preparing your file, checking for duplicates, running the import, and importing multiple emails or phone numbers for a single contact.

What you can do with CSV import

- Import contacts, opportunities, or both from a CSV file
 - Choose whether to create new contacts or create and update existing ones
 - Map your file's columns to GLM contact fields
 - Add imported contacts to a Smart List, a workflow, or tags during the import
 - Import up to 10 emails or phone numbers per contact
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Step 1: Set up your CSV and custom fields

When adding phone numbers that require a "+" sign, use an apostrophe at the beginning (e.g., '+191668128779).

- File upload and signature fields are **not supported** when importing.

Note

If importing a Do Not Disturb (DND) column, contacts will be set to DND for all communication channels. To control DND by specific channels, set up a workflow and use tags.

Step 2: Check for duplicates

Always clean your contact list and check for duplicates before importing. This helps prevent issues, especially for cold traffic campaigns, as duplicate records can lead to email deliverability issues.

Checking for duplicates in Excel

1. Highlight the column or range of cells where you want to check for duplicates.
2. Click the **Data** tab in the ribbon at the top.
3. In the Data Tools group, click **Remove Duplicates**. This opens a dialog box that allows you to specify the columns to check for duplicates.

4. If your data has multiple columns and you only want to check duplicates in specific columns, uncheck the others.
5. Click **OK**. Excel will delete the duplicate rows and keep only unique entries.

If you want to highlight duplicates rather than remove them, select the range, go to **Home → Conditional Formatting → Highlight Cells Rules → Duplicate Values**, and choose a formatting option. Excel will visually mark the duplicate cells for you.

Checking for duplicates in Google Sheets

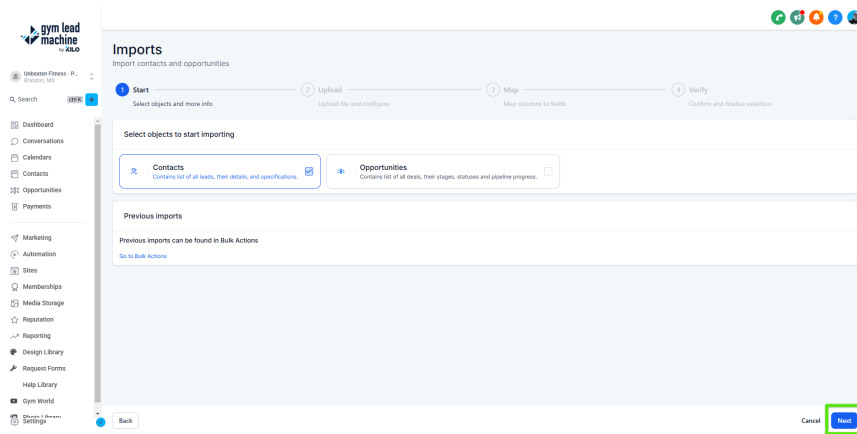
1. Highlight the column or range of cells where you want to check for duplicates.
2. Click the **Format** menu in the top toolbar.
3. Select **Conditional formatting** from the dropdown.
4. In the conditional formatting pane on the right, change the **Format cells if** option to **Custom formula is**.
5. Enter the formula `=COUNTIF(A:A,A1)>1`, adjusting the A:A and A1 references according to the column you're working with.
6. Select the color or style you want the duplicates to be highlighted in.
7. Click **Done**. Google Sheets will highlight any duplicates in the selected range.

To actually remove duplicates, select your data, go to **Data → Data cleanup → Remove duplicates**, and follow the prompts to delete duplicates from your sheet.

Step 3: Import your contacts

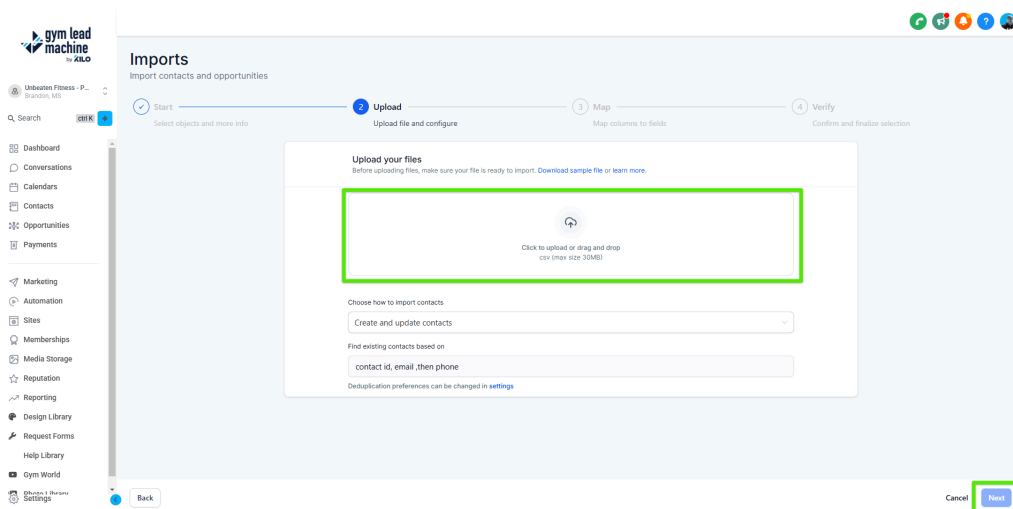
Access the Import Contacts section

1. Go to the **Contacts** section in GLM.
2. Click **Import Contacts** at the top.
3. Choose whether you want to import **Contacts** or **Opportunities** (or both). For this example, select **Contacts**.
4. Click **Next** in the bottom-right corner.



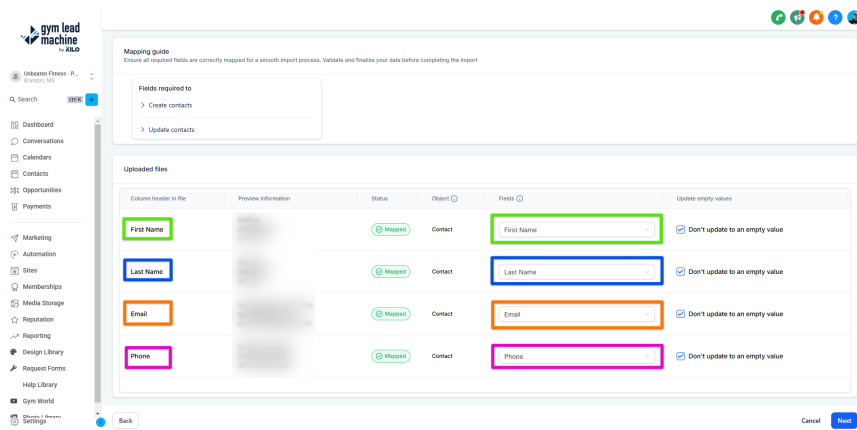
Upload your file

1. Upload your file containing the contacts you want to import.
2. Choose your preferred import method: **Create Contacts** adds new contacts, while **Create and Update Contacts** updates existing contacts if they already exist while adding new ones.
3. Select **Next** in the bottom-right corner.



Map the fields

1. Ensure that fields like **First Name**, **Last Name**, **Email**, and **Phone Number** are correctly mapped to the corresponding columns in your file.
2. Click **Next** to proceed.

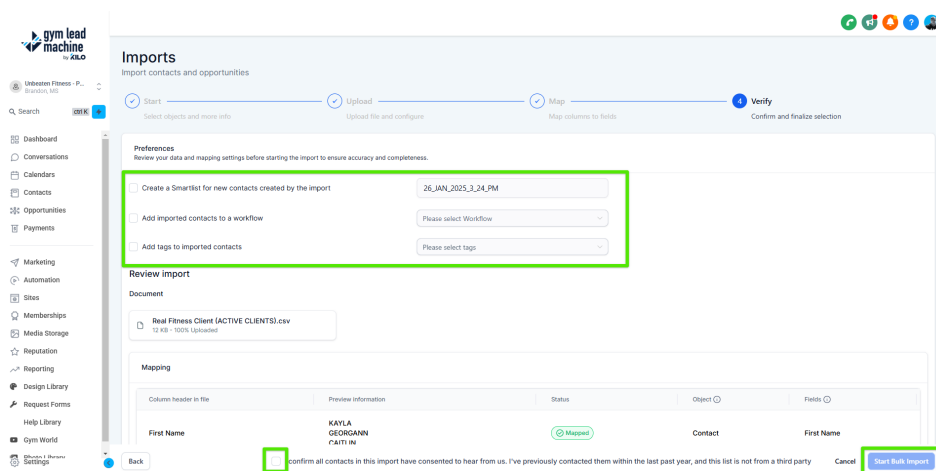


Configure additional settings

Optionally, you can:

- **Create a Smart List:** name and organize the imported contacts
- **Add to a Workflow:** assign the imported contacts to an existing workflow
- **Add Tags:** label the imported contacts for easier management

Adjust these settings as needed.



Start the bulk import

1. Check the confirmation box at the bottom of the screen.
2. Click **Start Bulk Import** to begin the process.

Importing multiple emails or phone numbers per contact

The system supports importing multiple emails or phone numbers for a single contact, using the **Additional Emails** and **Additional Phone Numbers** fields.

- Multiple email addresses or phone numbers should be in one column, separated by commas, slashes (/), or semicolons (;).
- During mapping, match these columns to the system's **Additional Emails** or **Additional Phone Numbers** fields.
- You can import up to **10 email IDs or phone numbers** per contact.

Conditions for importing multiple emails or phone numbers

- If the **primary email or phone** is blank but the additional field has data, the first additional entry becomes the primary contact information.
- If a contact already exists, new emails or phone numbers are **combined** with existing data.
- Invalid emails or phone numbers are discarded during the import.

If you have questions about importing contacts in Gym Lead Machine, our Support team is happy to help. Reach us at **hello@usekilo.com**.

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