

Managing Data

Importing, exporting, and cleaning up records safely.

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Importing & Exporting Records

Exporting

- Open any list view (e.g. Contacts), filter if you like, select records (or all), then **Export**.
- Choose the format (CSV or XLSX) and which fields to include.
- Exports are useful for reporting, a quick safety copy before a risky change, or prepping data for re-import.

“ Exported files often contain **personal information**. Store them responsibly and delete working copies when you're done.

Importing

Administration → **Import**.

1. **Choose the record type** and **upload your file** (CSV).
2. **Map each column** to a field. Getting this wrong writes data into the wrong place.
3. **Match by** a field (often *email*) so existing records are **updated** rather than duplicated.
4. Set the options (e.g. how to treat existing values) and run the **preview**.
5. Import.

“ **Always test a real import first** — in the Sandbox, or with just a handful of rows in Production — before running a big one. A wrong mapping or match field can create hundreds of duplicates or overwrite good data. Keep the source file so you can correct and re-run.

Tips for clean imports

- Tidy the spreadsheet first: consistent dates, phone formats, no stray columns.
- Use a **stable match field** (email is common) to update instead of duplicate.
- Import related records **in dependency order** — the thing being referred to before the thing that refers to it.

Duplicates, Mass Updates & Cleanup

Finding & merging duplicates

- The CRM flags likely duplicates when records are created, and you can hunt for them with filtered/sorted list views (by name or email).
- To merge: select two or more records in a list → **Merge** → choose which values to keep → confirm. Merging combines them into one and preserves their links.

“ Merging is **not easily undone**. Double-check you're merging the right records and keeping the right values.

Mass updates

- Select records in a list view → **Mass Update** → choose the field(s) and the new value → apply to **all selected**.
- Handy for bulk reassignment, status changes, or team changes.

“ A mass update changes **every selected record at once**. Check your **filter and selection** before applying. Sandbox-test anything large or unfamiliar.

Mass delete

- Select records → **Remove**.

⚠ **Deletion is the most dangerous bulk action.** Confirm the exact filter and selection. Prefer **deactivating or closing** records where the record type allows it. For anything beyond a few obvious junk rows, **Sandbox-test the exact filter first** and take an **export as a backup** immediately before deleting.

If you delete something by mistake

Stop making changes. Recovery usually means **restoring from backup**, which is time-sensitive — the sooner you raise it, the more recoverable it is. See [Troubleshooting & Recovery](#) and [Getting Help and Next Steps](#) right away.