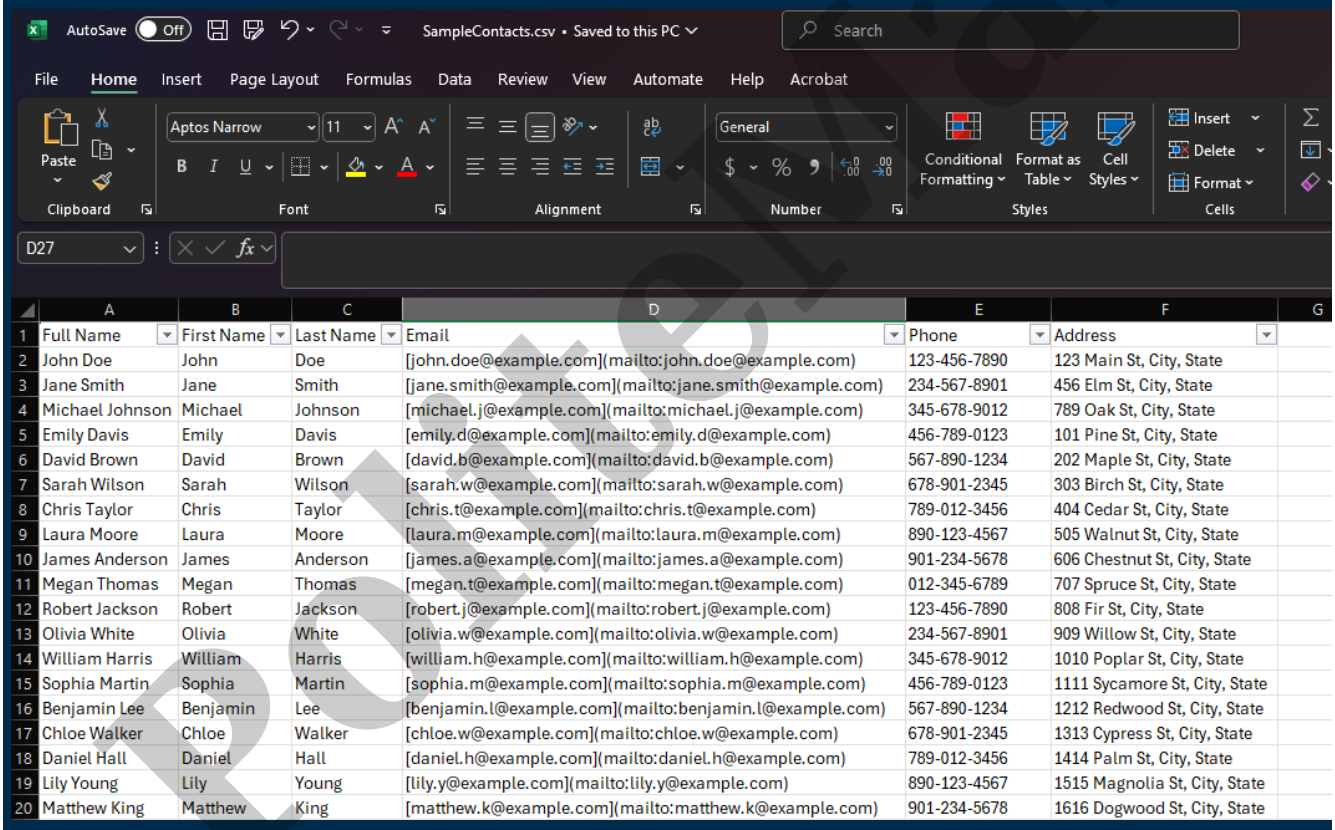
How do I create a list from a .csv file?

Last Modified on 11/12/2026 10:58 am EST

Importing People from a CSV File

PoliteMail should be configured to already access any current mailing lists you have in your Exchange environment. But what if you need to send a message to hundreds of recipients that are not on a dedicated list already? PoliteMail allows you to create a new list from a comma-separated volume (csv) file to make adding many new people quick and easy.

First: Create the CSV file



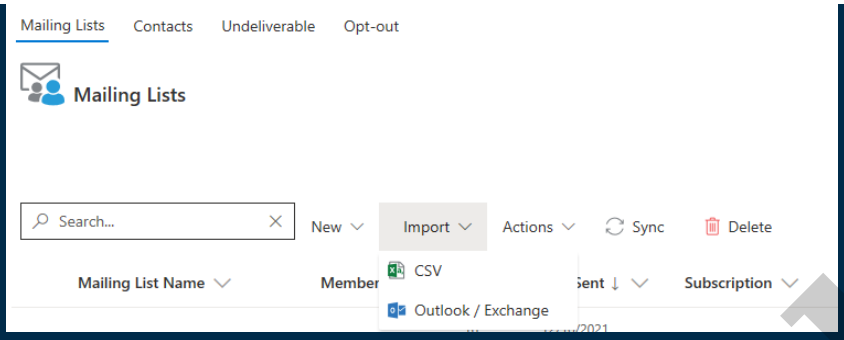
	A	B	C	D	E	F	G
1	Full Name	First Name	Last Name	Email	Phone	Address	
2	John Doe	John	Doe	john.doe@example.com	123-456-7890	123 Main St, City, State	
3	Jane Smith	Jane	Smith	jane.smith@example.com	234-567-8901	456 Elm St, City, State	
4	Michael Johnson	Michael	Johnson	michael.j@example.com	345-678-9012	789 Oak St, City, State	
5	Emily Davis	Emily	Davis	emily.d@example.com	456-789-0123	101 Pine St, City, State	
6	David Brown	David	Brown	david.b@example.com	567-890-1234	202 Maple St, City, State	
7	Sarah Wilson	Sarah	Wilson	sarah.w@example.com	678-901-2345	303 Birch St, City, State	
8	Chris Taylor	Chris	Taylor	chris.t@example.com	789-012-3456	404 Cedar St, City, State	
9	Laura Moore	Laura	Moore	laura.m@example.com	890-123-4567	505 Walnut St, City, State	
10	James Anderson	James	Anderson	james.a@example.com	901-234-5678	606 Chestnut St, City, State	
11	Megan Thomas	Megan	Thomas	megan.t@example.com	012-345-6789	707 Spruce St, City, State	
12	Robert Jackson	Robert	Jackson	robert.j@example.com	123-456-7890	808 Fir St, City, State	
13	Olivia White	Olivia	White	olivia.w@example.com	234-567-8901	909 Willow St, City, State	
14	William Harris	William	Harris	william.h@example.com	345-678-9012	1010 Poplar St, City, State	
15	Sophia Martin	Sophia	Martin	sophia.m@example.com	456-789-0123	1111 Sycamore St, City, State	
16	Benjamin Lee	Benjamin	Lee	benjamin.l@example.com	567-890-1234	1212 Redwood St, City, State	
17	Chloe Walker	Chloe	Walker	chloe.w@example.com	678-901-2345	1313 Cypress St, City, State	
18	Daniel Hall	Daniel	Hall	daniel.h@example.com	789-012-3456	1414 Palm St, City, State	
19	Lily Young	Lily	Young	lily.y@example.com	890-123-4567	1515 Magnolia St, City, State	
20	Matthew King	Matthew	King	matthew.k@example.com	901-234-5678	1616 Dogwood St, City, State	

At the very least, your list should contain the contact first name, last name, and email address. You could also include other information, including address, department, or even any custom fields you have created in PoliteMail.

Once created, if you're using Excel or Google Sheets, save the file as a .csv.

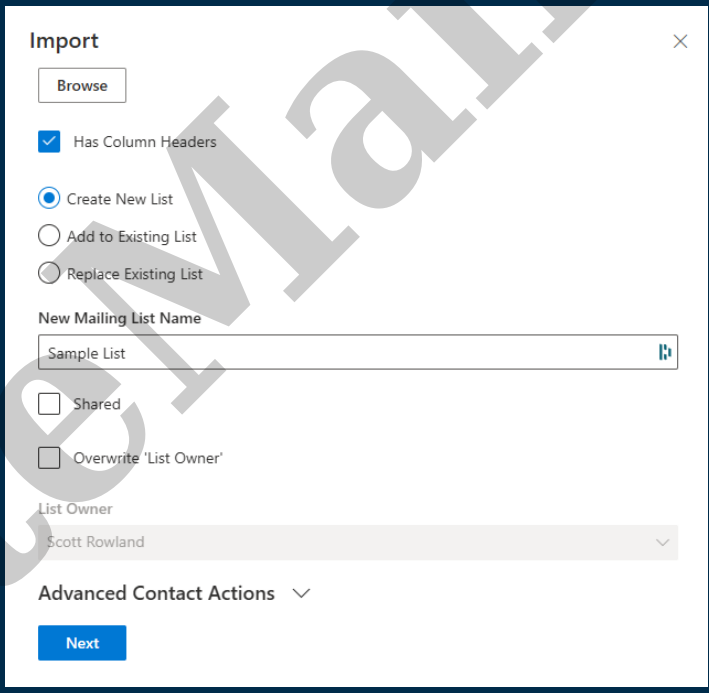
Second: Import into PoliteMail

Go to the grid showing your current Lists:



- Go to ☰ > **Mailing Lists > Mailing Lists**.

1. Click the 'Import' button and select 'CSV'. A panel will open on the right. Click the 'Browse' button and select your saved .csv file.



2. Check the box if your file contains headers. This makes the import easier to understand, but is not necessary.

3. Make your selection to create a new List, add to, or replace an existing List.

   a. Select **Create New List** to create a brand new mailing list, and give it a name.

   b. Select '**Add to Existing List**' to append any new addresses onto a List that already exists and you have access to, but will not remove any existing ones.

   c. Select '**Replace Existing List**' to remove all people in an existing list that you have access to and replace them with the people in the csv file. This is recommended if contacts need to be removed as well.

Be sure any custom fields you import are all the same data type in the .csv file. For example, if you are importing a custom field and that column contains some cells that are formatted as text and some that are formatted as a number, you will receive a #REF error.

Ownership & Segmentation

By default, the Owner, Business, and Region of each imported contact that is not already in PoliteMail will be you, the logged in User. This is to prevent any situation where some imported contacts in the List actually

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belong to another user or a Business/Region you do not have access to, thereby throwing off your Metrics.

A checkbox is provided where you can override the current List Owner and set it to someone else. Bear in mind the *List* Owner and *Contact* Owner could be different; only the Contact Owner can see the contacts and the metrics associated with them.

System Administrators will see an additional 'Advanced Contact Options' drop-down that allows them to override the Contact Owner, Business, or Region fields if needed.

4. Check the box if you want to make the List shared or if you want to override the List owner (the default is 'All Users'; if you change it to a specific person, only that person will have access to the metrics).
5. Click 'Next'.
6. The next panel lists the columns in the csv file, sample data from the first row, and a list of drop-down menus for you to select the corresponding PoliteMail field to import to. Do so, then click 'Save'.

Importing Time Zones

Time zone information for each person can also be imported with the csv. Select the proper mapping (the PoliteMail field is called 'Time Zone City'), and be sure your time zone is in the correct time zone/city format (the TZ identifier column in this wikipedia table).

Even if no contacts were successfully imported (for example, due to a typo), the list will still be created but contain no members.

PoliteMail Lists are not updated automatically; you will need to manually keep your Lists up to date.

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