LESSON 03 · LISTS

Import a mailing list

Bring in subscribers from any Excel file, a CSV, or rows pasted from anywhere. MailCrafter matches and tidies the columns for you.

Revision 1 · 21 November 2026
About 8 minutes

IN THIS LESSON

- Import from Excel, CSV or pasted rows
- Check how columns are matched to fields
- Choose what happens to subscribers you already have
- Save an import so you can repeat it in one click

Start the import

1. Open **Mailing lists** and click **Import** on the ribbon.
2. Drop your file on the window, or click **Choose file...**. Any Excel file works, old `.xls` or new `.xlsx`, as do CSV and text files.
3. No file? Click **Paste from clipboard**, then copy rows from Excel, Access, your accounting system or a web page and paste them in.
4. Leave **First row has column names** ticked if the first row holds headings.

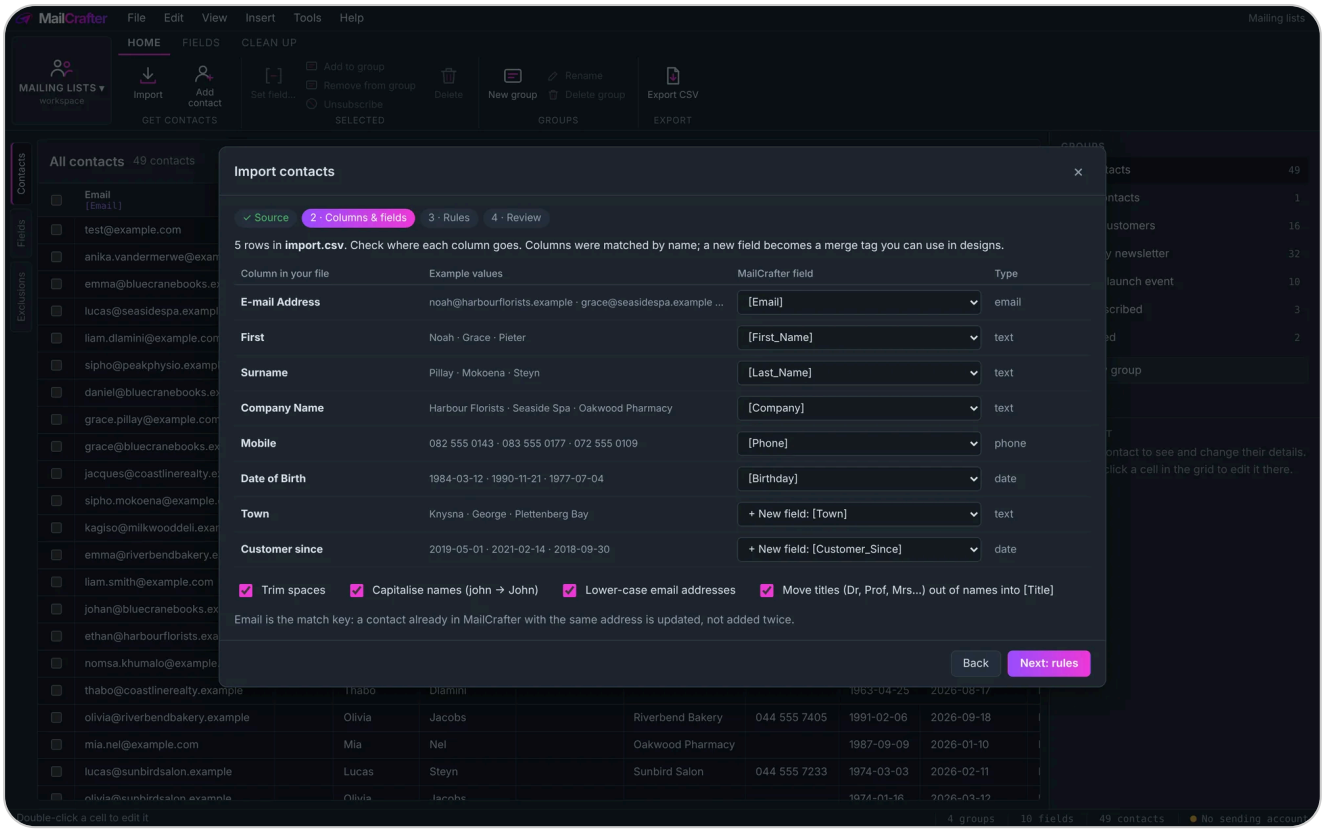
The window walks you through four steps: **Source**, **Columns & fields**, **Rules** and **Review**.

Columns and fields

MailCrafter reads your columns, shows a few example values from each, and matches them to fields by name: "E-mail Address" goes to `[Email]`, "Surname" to `[Last_Name]`, "Mobile" to `[Phone]`. Check each row:

- Pick a different field from the list if a match is wrong.

- Choose **New field** to keep a column MailCrafter doesn't know yet, such as "Customer since". It becomes a merge tag you can use in emails.
- Choose **Skip this column** for anything you don't need.



Underneath are clean-up options, on by default: **Trim spaces**, **Capitalise names**, **Lower-case email addresses**, and **Move titles** (Dr, Prof, Mrs…) out of names into `[Title]`.

> Email is the match key: a subscriber already in MailCrafter with the same address is updated, never added twice.

Rules

- **Put them in**: the list (group) they join, or **A new group…**.
- **Already in MailCrafter**: **Update their details from the file**, **Only fill in fields that are empty**, or **Leave them as they are (just add to the group)**.
- **How they agreed to emails**: for example **Existing customer** or **Signed up on the website**. MailCrafter keeps this record of consent with each subscriber.
- People who have unsubscribed are never subscribed again, even if they're in the file.

- **Save this import**: give it a name, such as "Shop customers", to run it again next time in one click.

Review

Before anything changes you see the counts: **New**, **Updated**, **Unchanged**, **Duplicates in file** and **Skipped** (rows without a valid email address). Click **Import** to finish.

> **Try it.** Export a few customers from your accounts or shop system to Excel and import them into a new group called "Test".

Next: work with lists, fields and merge tags.

Revision history

Revision	Date	What changed
1	21 November 2026	First edition.