

Importing from a CSV

Four of the areas described in [Marketing: the five areas](#) accept a CSV, so you can issue something to many customers at once.

Import	What it creates	Permission
Personal promotions	A promotion per customer, from a phone list	<i>Personal promotions — import</i>
Loyalty subscriptions	A subscription per customer, from a phone list	<i>Loyalty subscriptions — import</i>
Wallet credit	Credit per customer, from a phone list	<i>Wallet codes — import</i>
Vouchers	Voucher codes	<i>Voucher codes — import</i>

Promotional codes also import from CSV, but with progress tracking the others don't have — it gets its own page, [Importing promotional codes](#).

“ Each import permission is **separate** from the area's view and edit permissions. Being able to create wallet records one at a time does not imply being able to load thousands from a file.

Phone lists

Three of the four identify customers by **phone number**. The file is a list of phones plus whatever the import needs — an amount, a set of dates.

Phone numbers are where these imports go wrong. Before importing:

- **Check the format matches** how phones are stored for this brand — country prefix or not, spaces or not. A mismatch means rows silently match no customer.
- **Watch for spreadsheet damage.** Excel and Google Sheets both like to drop leading zeros and turn long numbers into scientific notation. A column formatted as *text* survives; a column formatted as *number* may not.
- **De-duplicate.** The same phone twice usually means that customer gets the benefit twice.

Before any import

1. **Start with a handful of rows.** Import five, confirm they landed as intended, then import the rest. This catches format problems for the price of five records instead of five thousand.
2. **Know what happens to an existing customer.** Whether a second import adds to what they have or replaces it decides whether re-running a file is safe.
3. **Keep the file.** It is the only record of exactly what you sent, and the only way to reverse it if you need to.

Imports are not transactional

An import that fails partway through does not roll back what it already did. Some customers will have received the benefit and others won't.

That is why the small test import matters, and why re-running a whole file after a partial failure is risky: the rows that already succeeded may be applied a second time.

If an import fails partway, work out **where** it stopped before deciding what to do — don't simply re-submit.

After importing

Spot-check two or three customers from the file and confirm they received what you intended, with the right amount and the right dates. The area's own browse screen is the place to do it: [Personal promotions](#), [Loyalty subscriptions](#), [Wallets: finding a customer](#) or [Vouchers](#).

If you need to undo one

There is no "undo import". What you have instead is a bulk delete, which removes matching **non-redeemed** records — see [How bulk changes work](#).

Anything customers already redeemed stays. This is the honest limit of reversing an import: you can take back what hasn't been used, not what has.