

How to Import Customers from CSV

By Zu Wei | Published Mar 19, 2026 | Customers | 3 min read

What Is This?

Importing lets you add customers to your Pixalink loyalty programme in bulk using a CSV file. This is perfect for migrating from another system, onboarding a large group, or updating existing customer records. You can also import from specific platforms like Storehub, Loyverse, WooCommerce, and more.

Real-Life Example

Puan Aida just signed up for Pixalink to run the loyalty programme at **Klinik Aida** in Klang. She has 2,000 existing patients in a spreadsheet. Instead of adding them one by one, she formats the spreadsheet as a CSV and imports them all in under a minute.

How to Import Customers

Step 1: Prepare Your CSV File

Create a CSV file with these columns (only **Phone Number** is required):

Column	Required	Format	Example
Phone Number	Yes	With country code or starting with 0	+60123456789 or 0123456789
Name	No	Text	Aida binti Hassan
Email	No	Email	aida@email.com
Gender	No	M, F, Male, or Female	F
Date of Birth	No	Date	1990-05-15
Source	No	Enum value	Direct, Email, Phone, WhatsApp
Status	No	Enum value	Open, Blocked, Do Not Contact
Space Slug	No	Your space's slug	linik-aida-klang
Tags	No	Comma-separated	vip, walk-in
Created At	No	Date	2025-01-01

Phone number formatting:

- Numbers starting with **0** are automatically converted to **+60** (Malaysia)
- You can include the country code directly: **+60123456789** , **+6512345678**
- Spaces and dashes are handled: **012-345 6789** works fine

Step 2: Open the Import


From the Admin Panel sidebar, go to **CRM** → **Customers**. Click the dropdown button in the **top-right header area** and select **Import From CSV**.


Pixalink

CRM

 Broadcast Batches

 Campaigns

 Customers

 QR Rewards

 Tags

Import Customers from CSV

CSV File

Drag & drop your file or browse

Enable Update

Step 3: Upload and Map Columns

1. Upload your CSV file.
2. Map each column in your CSV to the corresponding Pixalink field.
3. The system auto-detects common column names.

Column Mapping

Phone Number
phone_number

Name
name

Email
email

Gender
gender

Date of Birth
date_of_birth

Step 4: Choose Import Mode

Configure how the import handles duplicates:

- By default, the import is in **Create Only** mode — it creates new customers and skips existing phone numbers.
- **Enable Update** — Check this box to allow updating existing customers with new data from the CSV. When checked, two additional options appear:
 - **Update Only** — Only updates existing customers. Fails if a customer doesn't exist.
 - **Preserve Empty** (on by default) — Blank CSV fields don't overwrite existing data.

Import Options

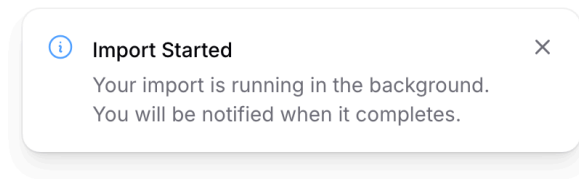
Enable Update

Update Only

Preserve Empty

Step 5: Run the Import

Click **Import** to start. The import runs in the background via a queue. You'll receive a notification when it completes, showing how many records were created, updated, or failed.



Other Import Sources

Besides CSV, Pixalink supports importing from many platforms:

- WhatsApp contacts
- Reservations
- Storehub POS
- Loyverse POS
- Bukku accounting
- Softinn hotel system
- WooCommerce
- Shopify
- iVend POS
- QNE accounting

Each has its own import option in the same dropdown menu.

Good to Know

- **Phone number is the unique key** — Pixalink identifies customers by phone number. Two records with the same number are treated as the same customer.
- **Auto-tagging** — If you include tags in the CSV, customers are automatically tagged and any tag-based reward automations will trigger.
- **Custom fields** — If your organisation uses custom fields, they appear as additional columns in the import mapping.
- **Preserve Empty is important** — Keep this on when doing partial updates. Otherwise, blank cells in your CSV will erase existing data.
- **Background processing** — Large imports run via queue. You can continue using the system while the import processes.

