

Import contacts into CRM

Bring in your contacts from wherever you store them:

- Email
- Spreadsheets
- Your phone

Microsoft Dynamics



get ready to import your contacts

Whether your contacts are stored in an email program, a spreadsheet, or on your phone, you'll probably want to import them into Microsoft Dynamics CRM so you can keep track of the people you do business with all in one place.



Applies to: Microsoft Dynamics CRM Online, or Microsoft Dynamics CRM 2013 or 2015 (on-premises)



use supported file formats

First, you export your contacts into a file.

These file formats are supported:

- Comma-separated values (**.csv**)
- Text (**.txt**)
- Compressed (**.zip**)
- Excel Spreadsheet 2003 (**.xml**)

The maximum file size allowed for .zip files is 32 MB.

For the other file formats, the maximum file size allowed is 8 MB.

Tip: Use .zip If you store contacts in more than one program, add all your import files to a single .zip file. Then import the .zip file to bring in all the files at once.



export from email

Need to export contacts from an email program?

1. Export the contacts into a comma-separated values file (.csv).

To find specific steps to export contacts from your email program, open the program's Help, and search for "export."

Look for topics that include "exporting contacts" or "exporting your address book" or "export wizard" in the title.

2. Save the file in a location where you can find it easily later.



export from a spreadsheet

Need to export contacts from a spreadsheet?

1. Open the spreadsheet.
2. For best results, edit any column name in the spreadsheet to match exactly with the name shown here.
3. Save the file in a location where you can easily find it later.

Column Name in spreadsheet (spelling must match exactly)
First Name
Middle Name
Last Name
Business Phone
Mobile Phone
Job Title
Business Street
Business City
Business State
Business Postal Code
Business Country/Region
Email Address

Heads-up! If the spreadsheet doesn't include all the column names listed in this table, that's okay.

However, if a column name does exist, make sure it matches exactly with the corresponding name in the table.

Spaces are required. Note that the word "Email" doesn't contain a hyphen.



export from your phone

Need to export contacts from a phone?

- Use a USB cable or an app to export your contacts from your phone to your computer.

To find specific steps to export contacts for your brand of phone, search for "export contacts from my phone" in your favorite search engine (such as Bing).

To find an app, search your phone's online store.

The screenshot shows a Bing search results page for the query "export contacts from nokia lumia 521". The search bar at the top contains the query. Below the search bar, there are navigation tabs for "Home", "Top charts", "Categories", and "Collections". The main heading reads "Results for 'export contacts' 83 apps". There are three filters: "All categories", "All prices", and "Sort by relevance". The results are displayed in a grid of four app cards:

- VCF Helper**: This tool is designed to help users in merging various Contact(.vcf) files into one single file. **Free** ★★★★★ 8 Tools
- vCard Wizard - Contacts converter for Outlook**: Sharing Microsoft Outlook Contacts is made simple with vCard Wizard. Export, import or sync contacts to vCard. **Desktop app** ★★★★★ 40 Productivity
- Contact & Address Book**: Contact & Address Book is filled with features that are easy to use. Add as many contacts as you want. **Free** ★★★★★ 43 Tools
- ExportContacts**: Contacts are exported from the Windows RT/8 with ExportContacts as a CSV-, XML-, vCard-, or vCard-. **\$2.99 (free trial)** Not yet rated Tools



run the wizard

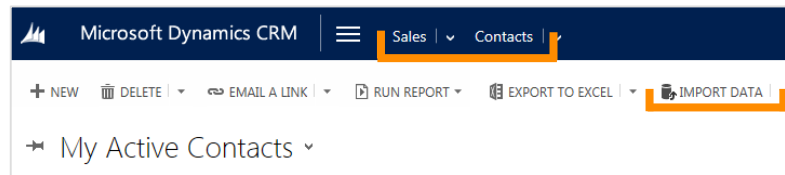
You'll use the Import Data wizard to import your contacts.

The steps to get to the wizard depend on the version you're using.

Tip for CRM admins: You'll find the Import Data wizard under **Settings > Data Management**.

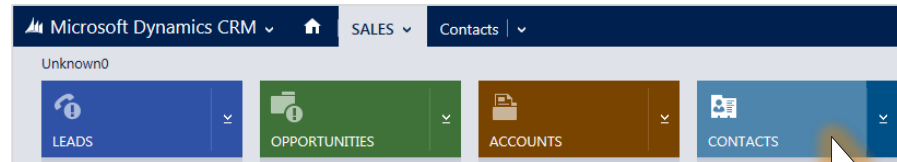
If your screen looks like this (latest version):

For **Sales, Service, or Marketing**, go to **Contacts**. Choose **Import Data**.



If your screen looks like this (older version):

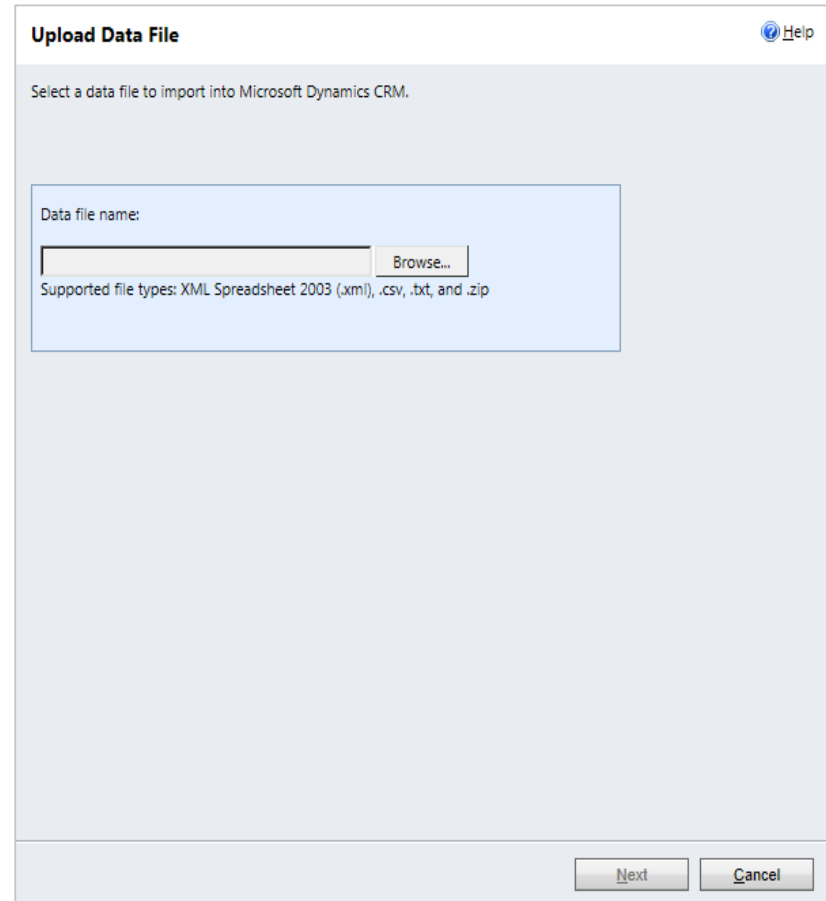
Choose **Microsoft Dynamics CRM > Sales, Service, or Marketing**. Go to **Contacts**. Then, choose **Imports > Import Data**.



select the file to import

Browse to the folder where you saved the file containing the export of your contacts.

Select the file, then choose **Open**.
Choose **Next**.



Upload Data File Help

Select a data file to import into Microsoft Dynamics CRM.

Data file name:

Supported file types: XML Spreadsheet 2003 (.xml), .csv, .txt, and .zip



review the upload summary

Review the file name, and if the file is in .csv or .txt format, verify that the field and data delimiters are correct. Choose **Next**.

Note: In most cases, you can accept the default delimiters.

Review File Upload Summary Help

The following data will be imported into Microsoft Dynamics CRM.

i 1 file uploaded.

File Name	Size
contacts--gmail.csv	60 KB

Delimiter Settings

Select the field and data delimiters. If there is more than one file, these delimiters will be applied to all files that you want to import.

Field delimiter:

Data delimiter:

First row contains column headings



select automatic mapping

Select **Default (Automatic Mapping)** for the System Data Map. Choose **Next**.

Select Data Map Help

Before your data can be imported, it must be mapped to the data in Microsoft Dynamics CRM. You can let the system map your data automatically, or you can select a data map to specify how your data will be imported.

System Data Maps

- Default (Automatic Mapping)**
For Generic Contact and Account Data
- SampleDataMap
- Data Maps for Salesforce.com**
For Contact and Account Report Export
For Full Data Export
For Report Export
- Data Maps for Microsoft Outlook Business Contact Manager**
For BCM 2010

Back Next Cancel



select "contact" for the type of info

In the **Microsoft Dynamics CRM Record Types** drop-down list, select **Contact**. Choose **Next**.

Map Record Types Help

Map the source data files to the target Microsoft Dynamics CRM record types. If a source file cannot be mapped to an existing record type, you can create a new record type or choose to skip importing the data.

✔ The data files have been successfully mapped to the target Microsoft Dynamics CRM record types.

Source Data Files	Microsoft Dynamics CRM Record Types
✔ contacts--gmail	Contact Actions Not Mapped Create New Ignore Record Types Account Address Announcement Appointment Article Article Template Business Unit Campaign Campaign Activity Campaign Response Case Case Resolution Competitor Connection Contact Contract Contract Line Contract Template Currency Customer Relationship Discount Discount List Document Location Email Facility/Equipment



map the fields

For any field name with an alert icon, map the column from your contacts file to the corresponding field in CRM.

Choose **OK**, then choose **Next**.

Map Fields Help

Select the Microsoft Dynamics CRM record type and map each source field to a target Microsoft Dynamics CRM field. We suggest that you map all the required fields before you click Next.

Map the unmapped fields, and then continue.

CRM Record Types	Source Fields	CRM Fields
Contact		Show All <input type="button" value="v"/>
Required Fields		
	Last Name <input type="button" value="v"/>	Last Name
Optional Fields		
Account		Not Mapped <input type="button" value="v"/>
Anniversary		Anniversary <input type="button" value="v"/>
Assistant's Name		Not Mapped <input type="button" value="v"/>
Assistant's Phone		Not Mapped <input type="button" value="v"/>
Billing Information		Not Mapped <input type="button" value="v"/>
Birthday		Birthday <input type="button" value="v"/>
Business Address		Not Mapped <input type="button" value="v"/>
Business Address PO Box		Not Mapped <input type="button" value="v"/>
Business City		Not Mapped <input type="button" value="v"/>




check the summary

Review the summary, and then choose **Next**.

Review Mapping Summary Help

The data from the source files has been successfully mapped to the target record types and fields in Microsoft Dynamics CRM. The data is ready to import.

Source Data Files	Microsoft Dynamics CRM Record Types
✓ contacts--gmail.csv	Contact

 Data in any record types or fields that are set to Ignore will not be imported. To view or change the record type and field mappings, click Edit.

Edit

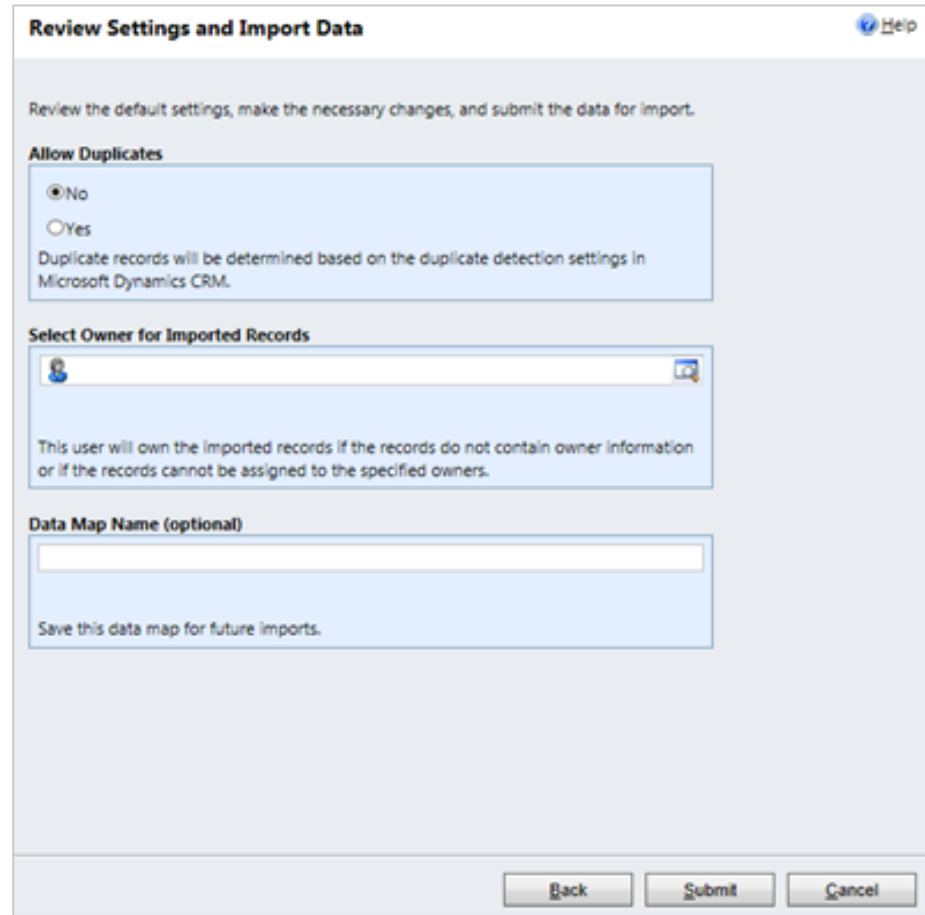
Back Next Cancel



submit the import file

Choose **Submit**.

Note: In most cases, you can accept the defaults on this screen.



The screenshot shows a dialog box titled "Review Settings and Import Data" with a "Help" icon in the top right corner. The main instruction reads: "Review the default settings, make the necessary changes, and submit the data for import." The dialog is divided into three sections:

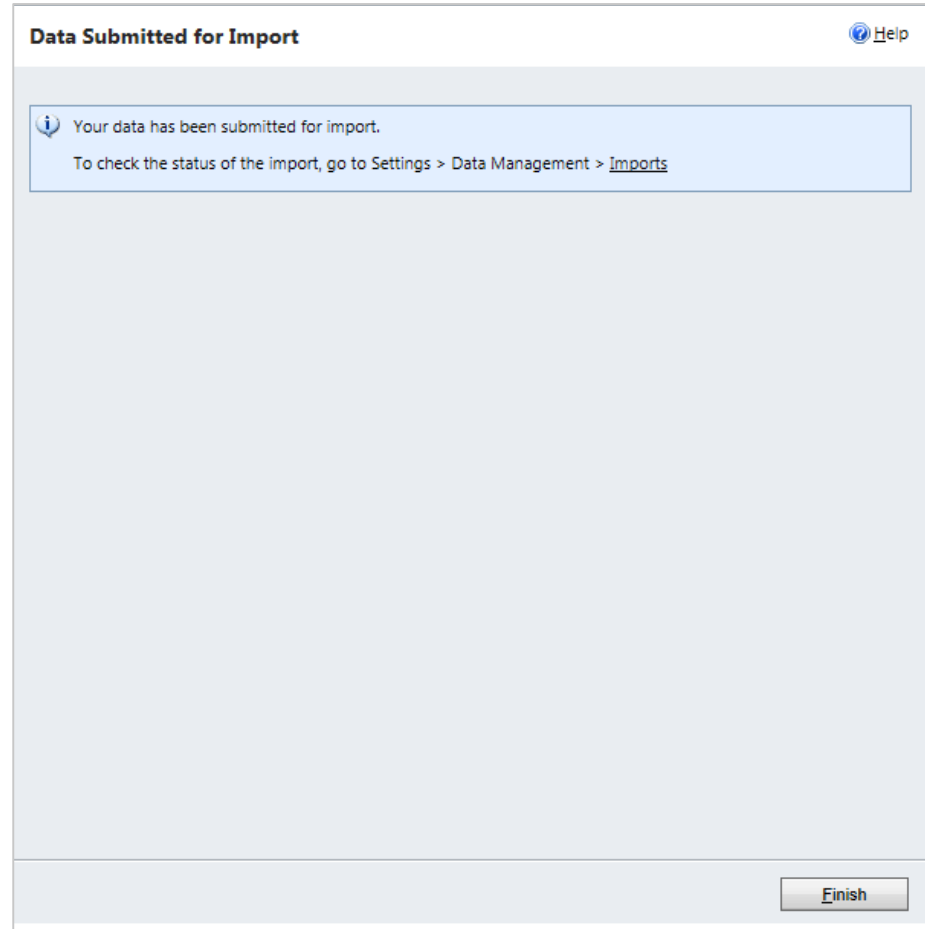
- Allow Duplicates:** Contains two radio buttons: "No" (which is selected) and "Yes". Below them is the text: "Duplicate records will be determined based on the duplicate detection settings in Microsoft Dynamics CRM."
- Select Owner for Imported Records:** Features a user selection dropdown menu with a user icon and a search icon. Below the dropdown is the text: "This user will own the imported records if the records do not contain owner information or if the records cannot be assigned to the specified owners."
- Data Map Name (optional):** Includes an empty text input field. Below the field is the text: "Save this data map for future imports."

At the bottom of the dialog, there are three buttons: "Back", "Submit", and "Cancel".



verify the import

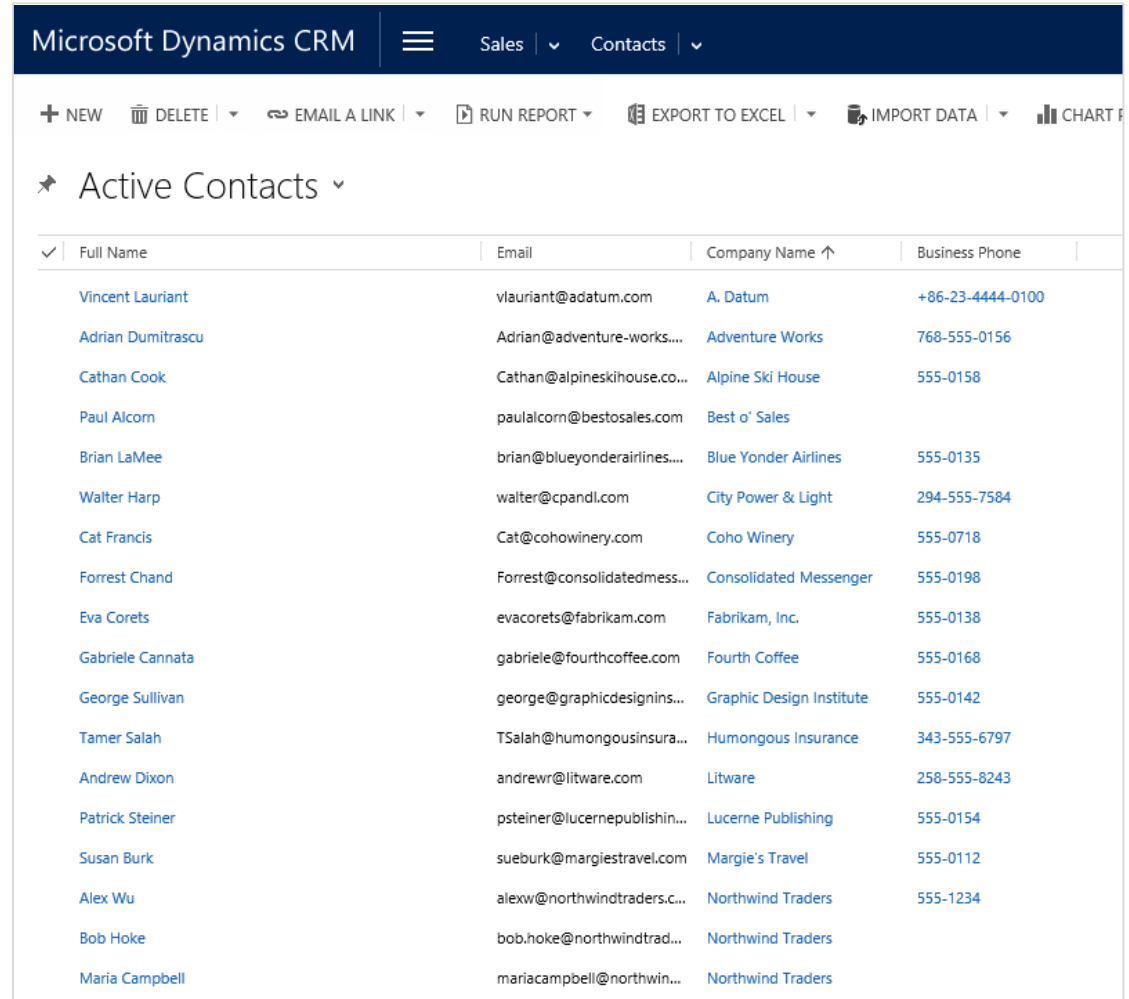
To verify that the wizard was successful, choose **Imports**, then review the report. Otherwise, choose **Finish**.



check for success

After you run the wizard, check your list of contacts in Microsoft Dynamics CRM to make sure they imported correctly.

1. For **Sales, Service, or Marketing**, go to **Contacts**.
2. Scroll through the contact list. Check that each person is listed, and verify the contents of the fields for accuracy.



The screenshot shows the Microsoft Dynamics CRM interface. At the top, there is a navigation bar with 'Microsoft Dynamics CRM' and a hamburger menu icon. Below the navigation bar, there are several action buttons: '+ NEW', 'DELETE', 'EMAIL A LINK', 'RUN REPORT', 'EXPORT TO EXCEL', 'IMPORT DATA', and 'CHART'. The main content area is titled 'Active Contacts' and displays a table of contact information.

✓	Full Name	Email	Company Name ↑	Business Phone
	Vincent Lauriant	viauriant@adatum.com	A. Datum	+86-23-4444-0100
	Adrian Dumitrascu	Adrian@adventure-works....	Adventure Works	768-555-0156
	Cathan Cook	Cathan@alpineskihouse.co...	Alpine Ski House	555-0158
	Paul Alcorn	paulalcorn@bestosales.com	Best o' Sales	
	Brian LaMee	brian@blueyonderairlines....	Blue Yonder Airlines	555-0135
	Walter Harp	walter@cpandl.com	City Power & Light	294-555-7584
	Cat Francis	Cat@cohowinery.com	Coho Winery	555-0718
	Forrest Chand	Forrest@consolidatedmess...	Consolidated Messenger	555-0198
	Eva Corets	evacorets@fabrikam.com	Fabrikam, Inc.	555-0138
	Gabriele Cannata	gabriele@fourthcoffee.com	Fourth Coffee	555-0168
	George Sullivan	george@graphicdesignins...	Graphic Design Institute	555-0142
	Tamer Salah	TSalah@humongousinsura...	Humongous Insurance	343-555-6797
	Andrew Dixon	andrewr@litware.com	Litware	258-555-8243
	Patrick Steiner	psteiner@lucernepublishin...	Lucerne Publishing	555-0154
	Susan Burk	sueburk@margiestravel.com	Margie's Travel	555-0112
	Alex Wu	alexw@northwindtraders.c...	Northwind Traders	555-1234
	Bob Hoke	bob.hoke@northwindtrad...	Northwind Traders	
	Maria Campbell	mariacampbell@northwin...	Northwind Traders	



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