

# Bring in your contacts

Import your contacts from  
wherever you store them:

- Email
- Spreadsheets
- Your phone

 Microsoft Dynamics CRM



Getting  
Started  
Series

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# 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.



# 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** If you store contacts in more than one program, add 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.

**Heads-up!** If the spreadsheet doesn't include all the column names listed, that's okay. However, if a column name does exist, make sure it matches exactly with the corresponding name in the list.

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

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





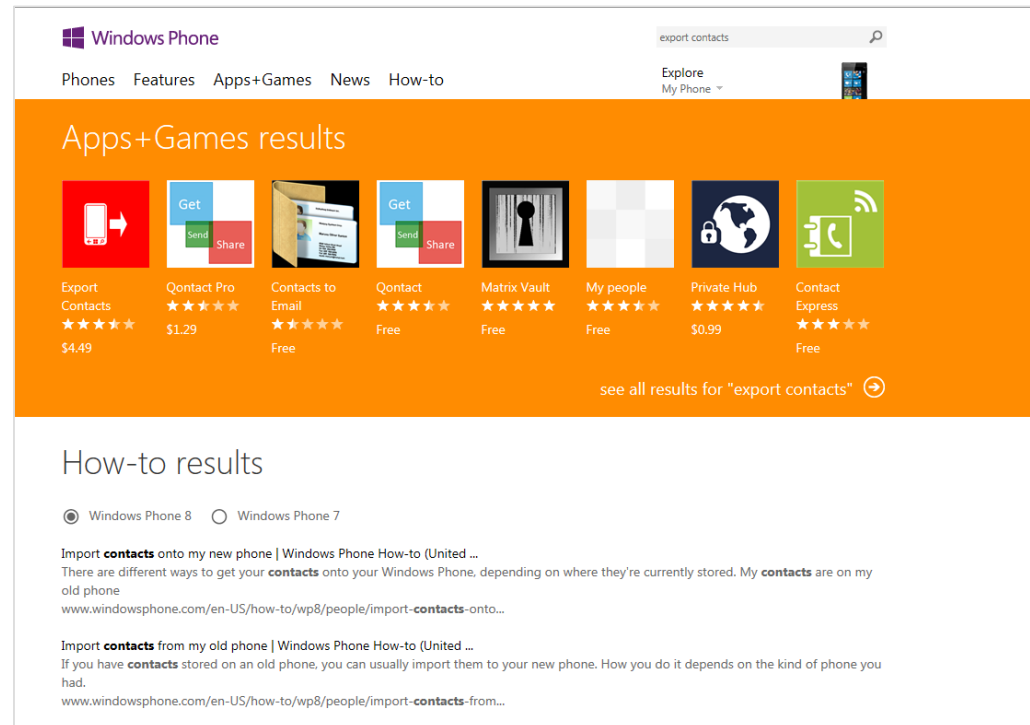
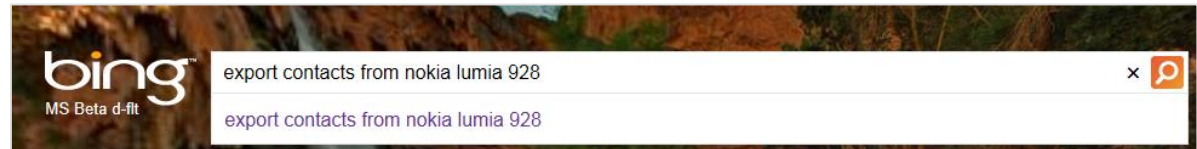
# export from your phone

## Need to export contacts from a phone?

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

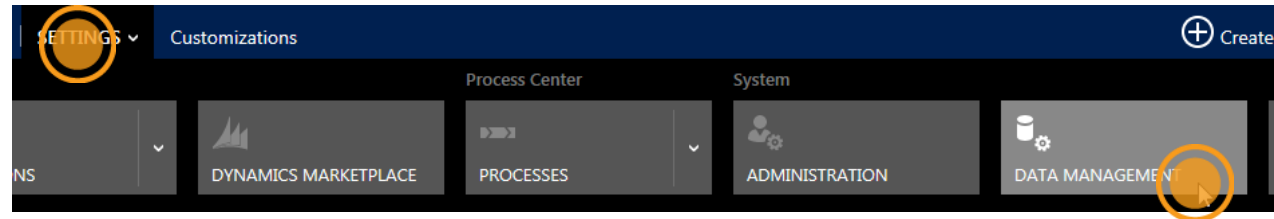
To find specific steps to export contacts for your brand of phone, search for "export contacts from my phone" in your favorite search engine (like Bing).

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



# sign in and run the wizard

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



## 1. If using the Microsoft Dynamics CRM web app:

On the nav bar, click or tap **Microsoft Dynamics CRM** > **Settings**. Then click or tap **Settings** > **Data Management**.

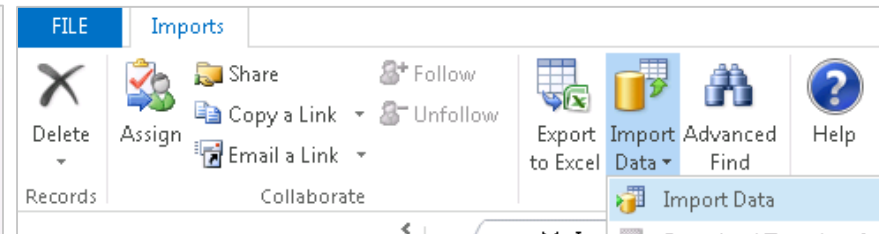
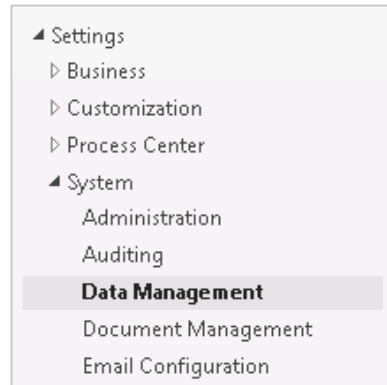
Click or tap **Imports** > **Import Data**.

–OR–

## 1. If using CRM for Outlook:

In the Navigation Pane, click or tap **Settings** > **System** > **Data Management**.

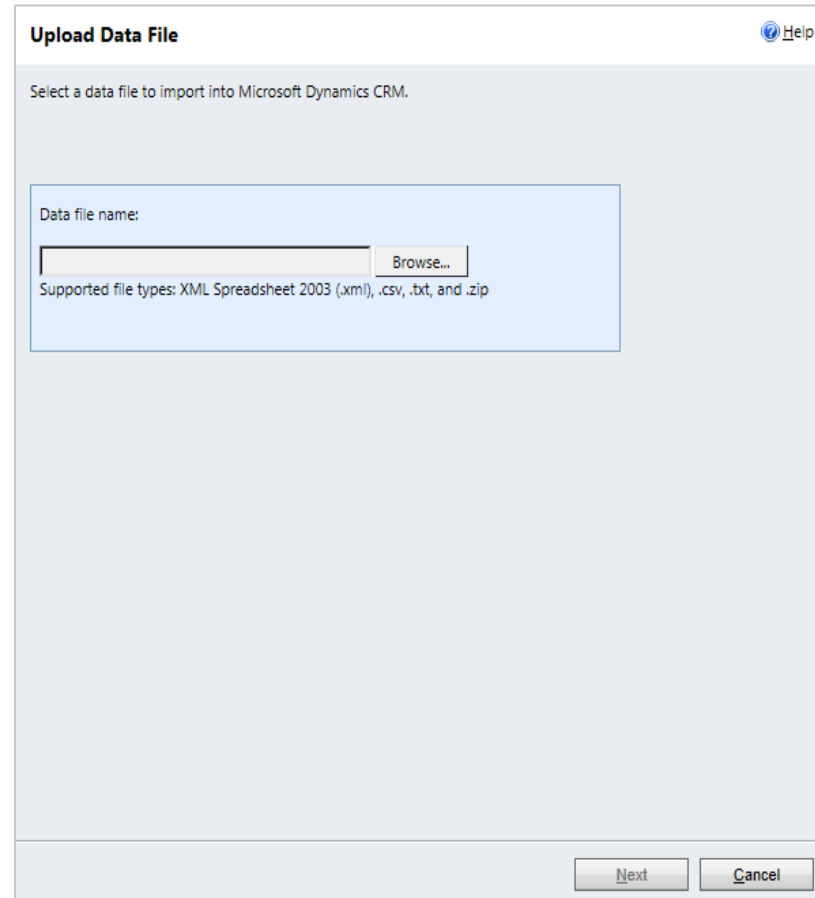
Click or tap **Imports** > **Import Data**.



# select the file to import

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

Select the file, then click or tap **Open**. Click or tap **Next**.



The screenshot shows a dialog box titled "Upload Data File" with a "Help" icon in the top right corner. The main text reads "Select a data file to import into Microsoft Dynamics CRM." Below this, there is a section with a light blue background. Inside this section, the text "Data file name:" is followed by a text input field and a "Browse..." button. Below the input field, it says "Supported file types: XML Spreadsheet 2003 (.xml), .csv, .txt, and .zip". At the bottom of the dialog box, there are two buttons: "Next" and "Cancel".





# review the upload summary

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

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:

Comma ( , )

Data delimiter:

Quotation mark ( " )

☒ First row contains column headings

Back

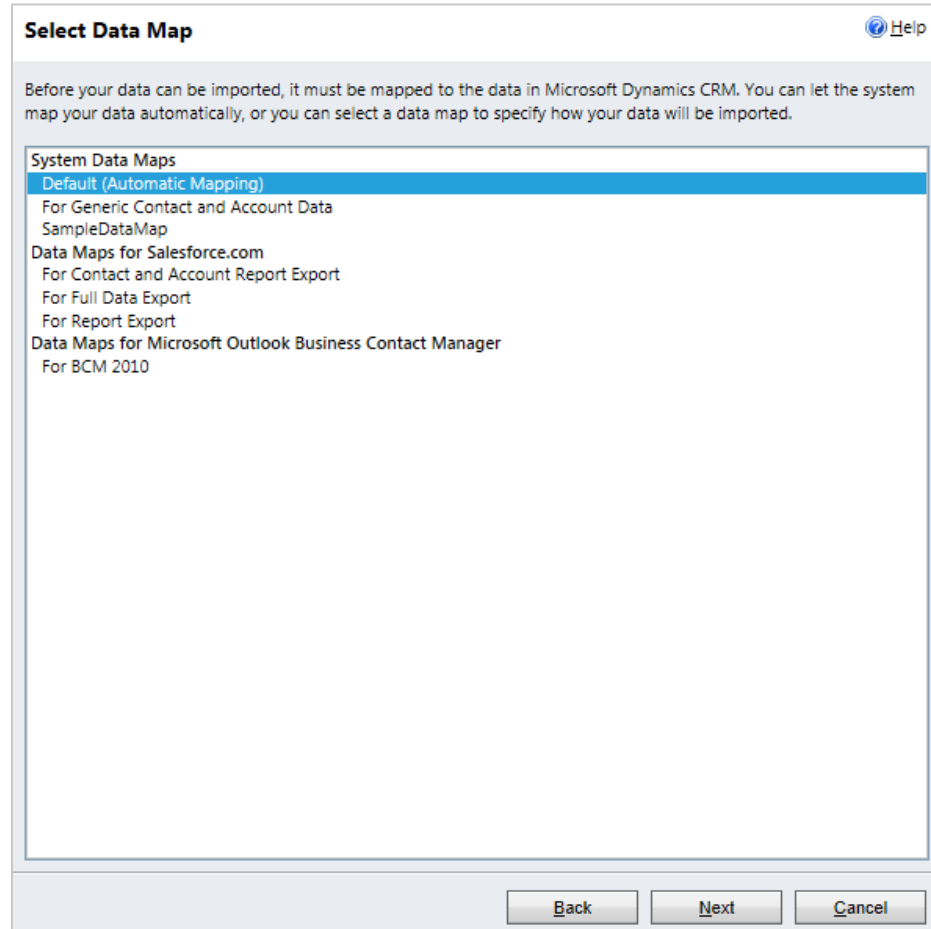
Next

Cancel



# select automatic mapping

4. Select **Default (Automatic Mapping)** for the System Data Map. Click or tap **Next**.



The screenshot shows a 'Select Data Map' dialog box. At the top, there is a title bar with 'Select Data Map' and a 'Help' icon. Below the title bar, a text box explains: '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.' Below this text is a list box titled 'System Data Maps'. The list contains the following items: 'Default (Automatic Mapping)' (which is highlighted with a blue background), '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', and 'For BCM 2010'. At the bottom of the dialog box, there are three buttons: 'Back', 'Next', and 'Cancel'.

**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

5. In the **Microsoft Dynamics CRM Record Types** drop-down list, select **Contact**. Click or tap **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.


Click or tap **OK**, then click or tap **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
 <b>Contact</b>	<b>Required Fields</b>	Show All 
	Last Name 	Last Name
	<b>Optional Fields</b>	
	Account	 Not Mapped 
	Anniversary	Anniversary 
	Assistant's Name	 Not Mapped 
	Assistant's Phone	 Not Mapped 
	Billing Information	 Not Mapped 
	Birthday	Birthday 
	Business Address	 Not Mapped 
	Business Address PO Box	 Not Mapped 
	Business City	 Not Mapped 

 Map the unmapped fields, and then continue.

[Back](#) [Next](#) [Cancel](#)



# check the summary

7. Review the summary, and then click or tap **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

BackNextCancel



# submit the import file

8. Click or tap **Submit**.

**Review Settings and Import Data** [Help](#)


Review the default settings, make the necessary changes, and submit the data for import.

**Allow Duplicates**

☒ No  
☐ Yes

Duplicate records will be determined based on the duplicate detection settings in Microsoft Dynamics CRM.

**Select Owner for Imported Records**



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)**

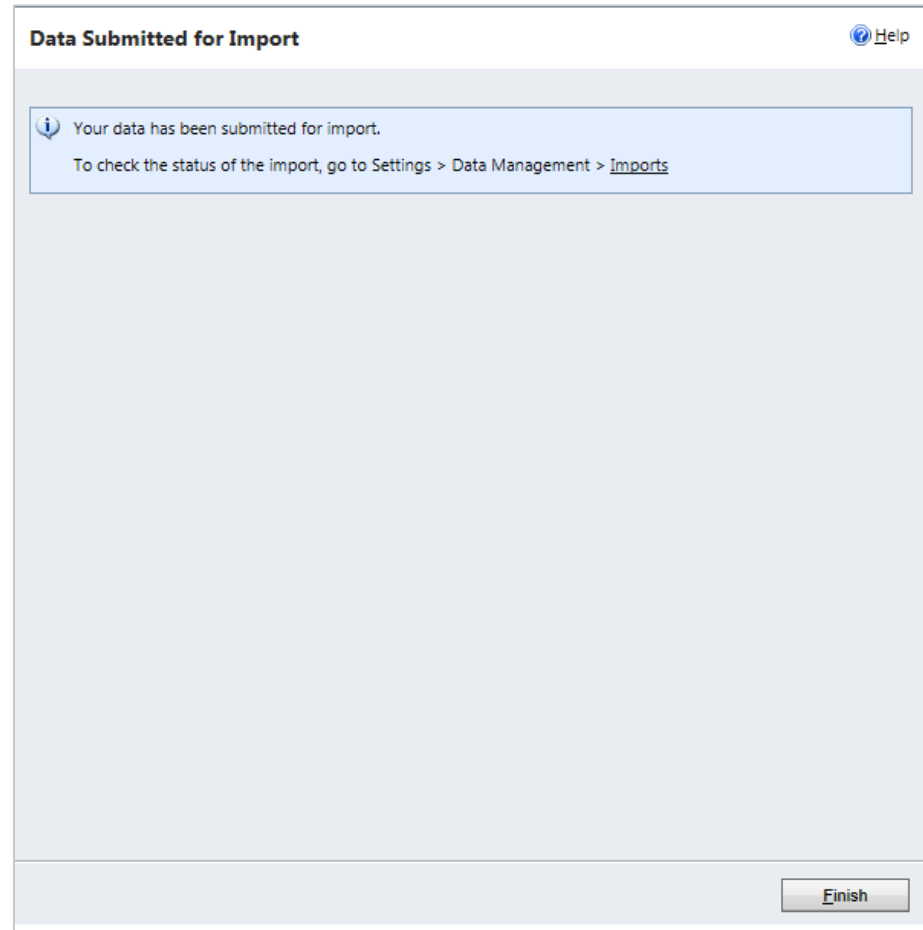
Save this data map for future imports.

[Back](#) [Submit](#) [Cancel](#)



# verify the import

9. To verify that the wizard was successful, click or tap **Imports**, then review the report. Otherwise, click or tap **Finish**.

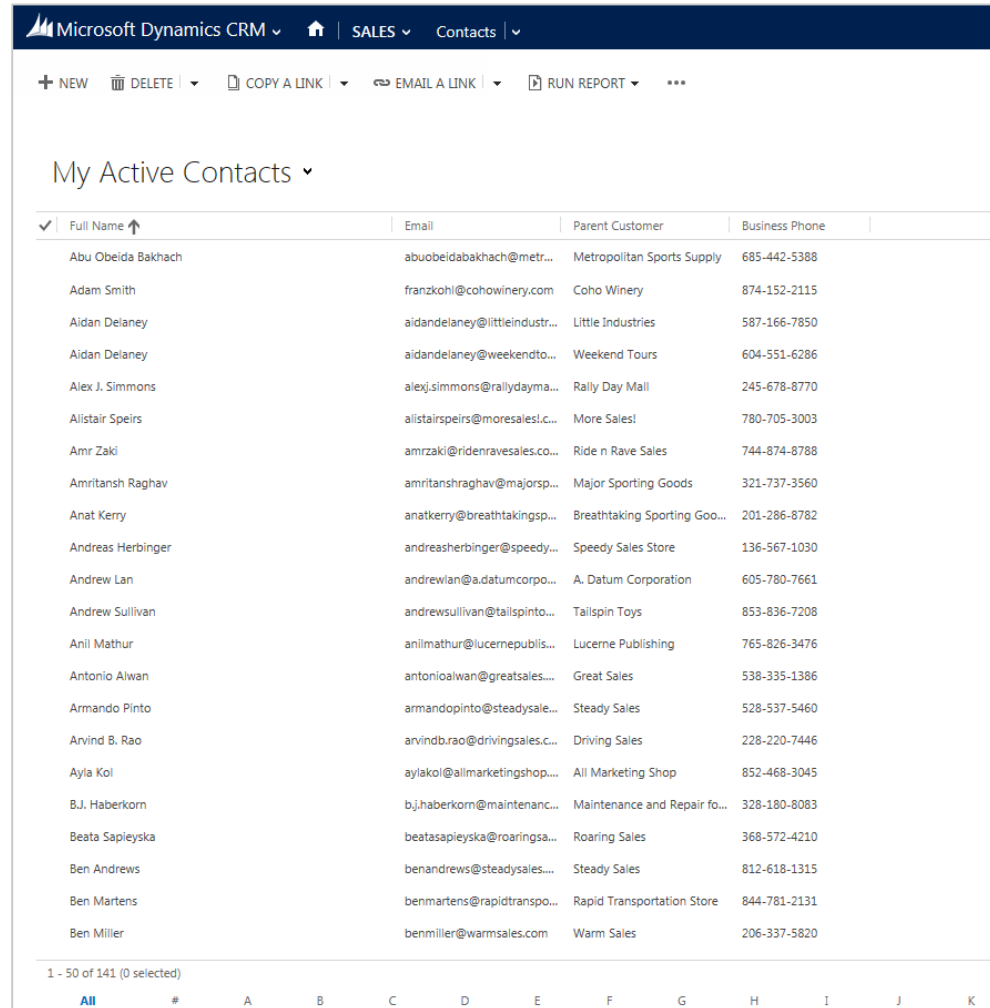




# check for success

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

1. On the nav bar, click or tap **Microsoft Dynamics CRM**, and then click or tap your work area (either Sales, Service, or Marketing).
2. Click or tap **Contacts**.
3. 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. The top navigation bar includes the Microsoft Dynamics CRM logo, a home icon, and tabs for SALES and Contacts. Below the navigation bar is a toolbar with options: + NEW, DELETE, COPY A LINK, EMAIL A LINK, RUN REPORT, and a menu icon. The main content area is titled 'My Active Contacts' and displays a table of contacts. The table has columns for Full Name, Email, Parent Customer, and Business Phone. The contacts listed include Abu Obeida Bakhach, Adam Smith, Aidan Delaney, Alex J. Simmons, Alistair Speirs, Amr Zaki, Amritansh Raghav, Anat Kerry, Andreas Herbinger, Andrew Lan, Andrew Sullivan, Anil Mathur, Antonio Alwan, Armando Pinto, Arvind B. Rao, Ayla Koi, B.J. Haberkorn, Beata Sapieyska, Ben Andrews, Ben Martens, and Ben Miller. At the bottom of the table, it indicates '1 - 50 of 141 (0 selected)' and a row of filter letters: All, #, A, B, C, D, E, F, G, H, I, J, K.

Full Name	Email	Parent Customer	Business Phone
Abu Obeida Bakhach	abuobeidabakhach@metr...	Metropolitan Sports Supply	685-442-5388
Adam Smith	franzkohl@cohowinery.com	Coho Winery	874-152-2115
Aidan Delaney	aidandelaney@littleindustr...	Little Industries	587-166-7850
Aidan Delaney	aidandelaney@weekendto...	Weekend Tours	604-551-6286
Alex J. Simmons	alexj.simmons@rallydayma...	Rally Day Mall	245-678-8770
Alistair Speirs	alistairspeirs@moresalesl.c...	More Sales!	780-705-3003
Amr Zaki	amrzaki@ridenravesales.co...	Ride n Rave Sales	744-874-8788
Amritansh Raghav	amritanshraghav@majorsp...	Major Sporting Goods	321-737-3560
Anat Kerry	anatkerry@breathtakingsp...	Breathtaking Sporting Goo...	201-286-8782
Andreas Herbinger	andreasherbinger@speedy...	Speedy Sales Store	136-567-1030
Andrew Lan	andrewlan@a.datumcorpo...	A. Datum Corporation	605-780-7661
Andrew Sullivan	andrewsullivan@tailspinto...	Tailspin Toys	853-836-7208
Anil Mathur	anilmathur@lucernepublis...	Lucerne Publishing	765-826-3476
Antonio Alwan	antonioalwan@greatsales...	Great Sales	538-335-1386
Armando Pinto	armandopinto@steadysale...	Steady Sales	528-537-5460
Arvind B. Rao	arvindb.rao@drivingsales.c...	Driving Sales	228-220-7446
Ayla Koi	aylakoi@allmarketingshop...	All Marketing Shop	852-468-3045
B.J. Haberkorn	bj.haberkorn@maintenanc...	Maintenance and Repair fo...	328-180-8083
Beata Sapieyska	beatasapieyska@roaringsa...	Roaring Sales	368-572-4210
Ben Andrews	benandrews@steadysales...	Steady Sales	812-618-1315
Ben Martens	benmartens@rapidtranspo...	Rapid Transportation Store	844-781-2131
Ben Miller	benmiller@warmsales.com	Warm Sales	206-337-5820

That's it!



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Version 6.0.0

