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.

Applies to: Microsoft Dynamics CRM 2013 & Microsoft Dynamics CRM Online Fall '13

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

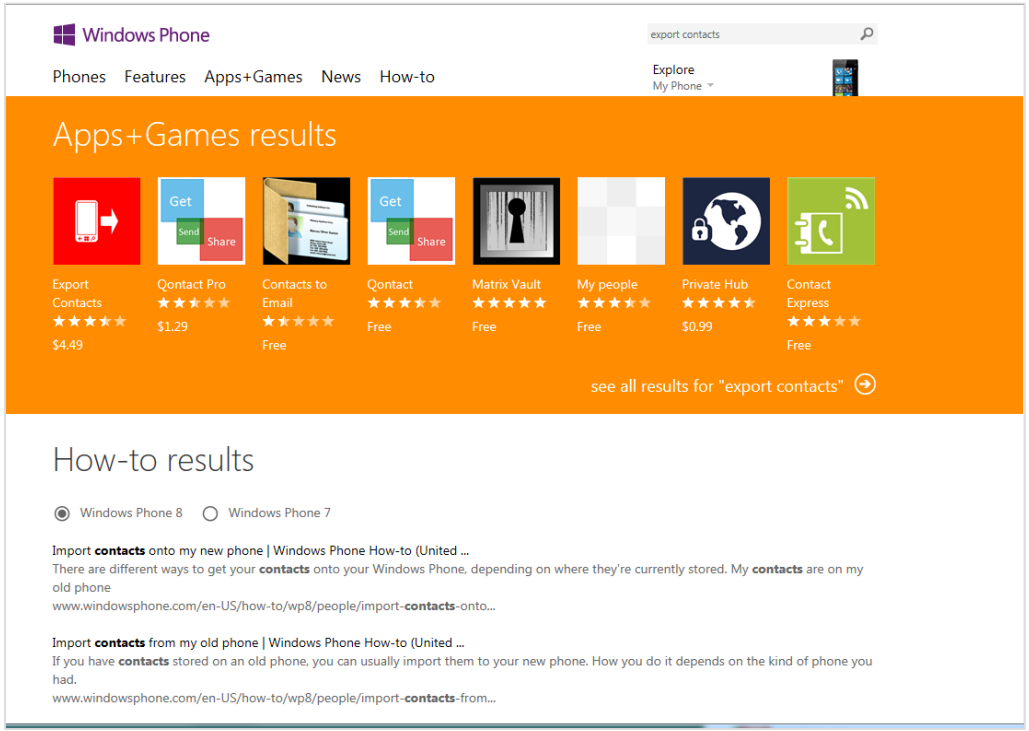
export from your phone

Need to export contacts from a phone?

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

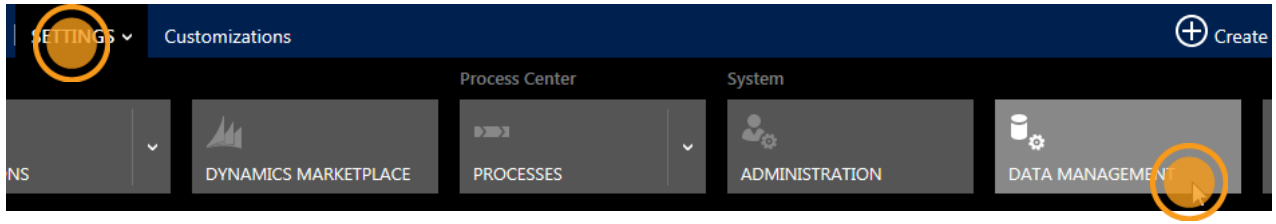
  To find specific steps to export contacts for your brand of phone, search for “export contacts from my phone” in your favorite search engine (like Bing).

  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:**

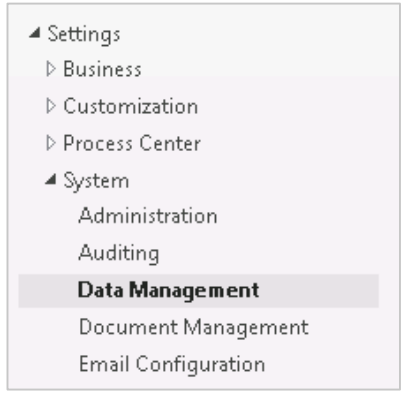
   On the nav bar, click or tap **Microsoft Dynamics CRM** > **Settings**. Then click or tap **Settings** > **Data Management**.

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

–OR–

1. **If using CRM for Outlook:**
   In the Navigation Pane, click or tap **Settings** > **System** > **Data Management.**

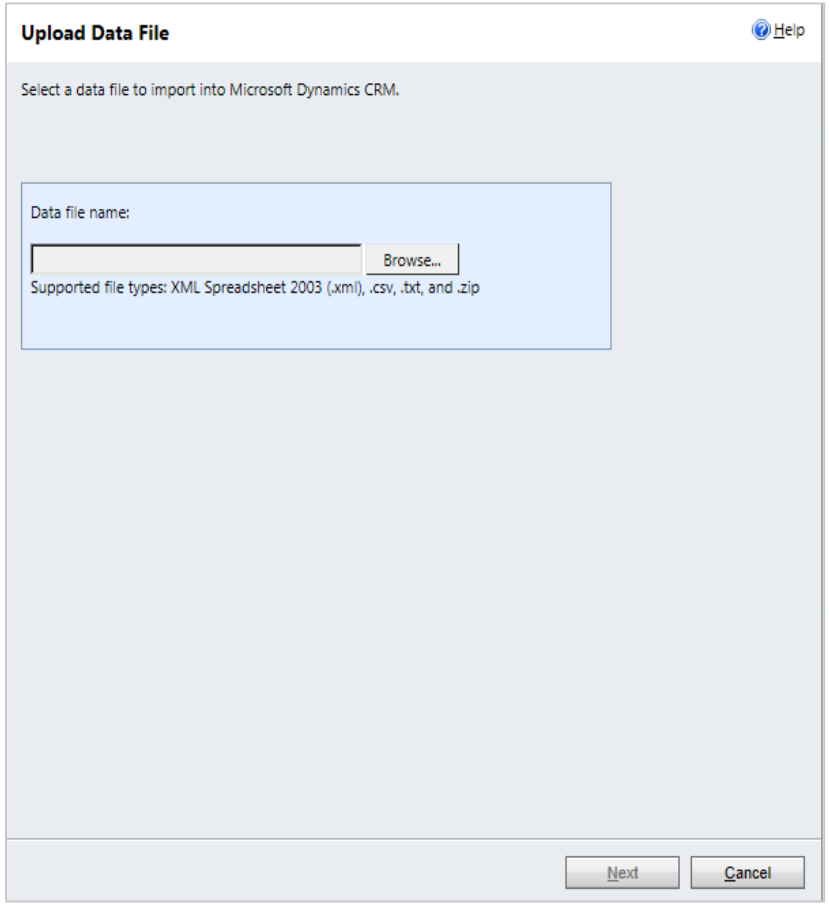
   Click or tap **Imports > Import Data**.



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**.



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.

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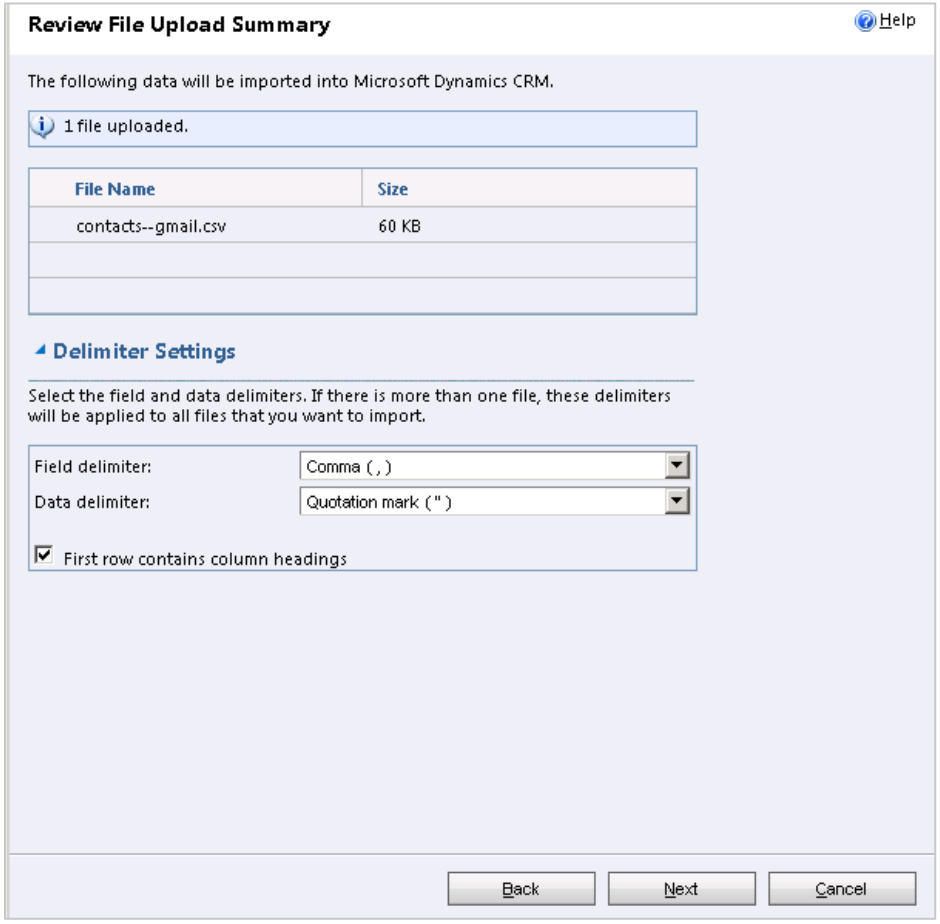

select automatic mapping

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

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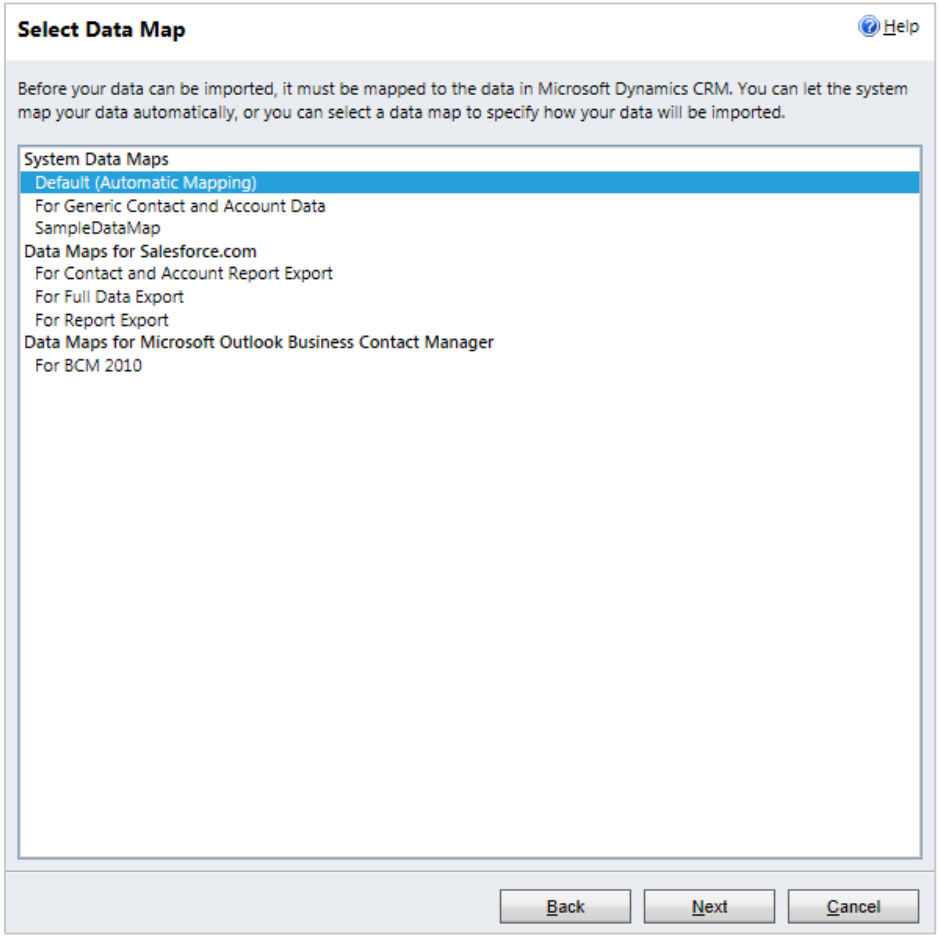

select “contact” for the type of info

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

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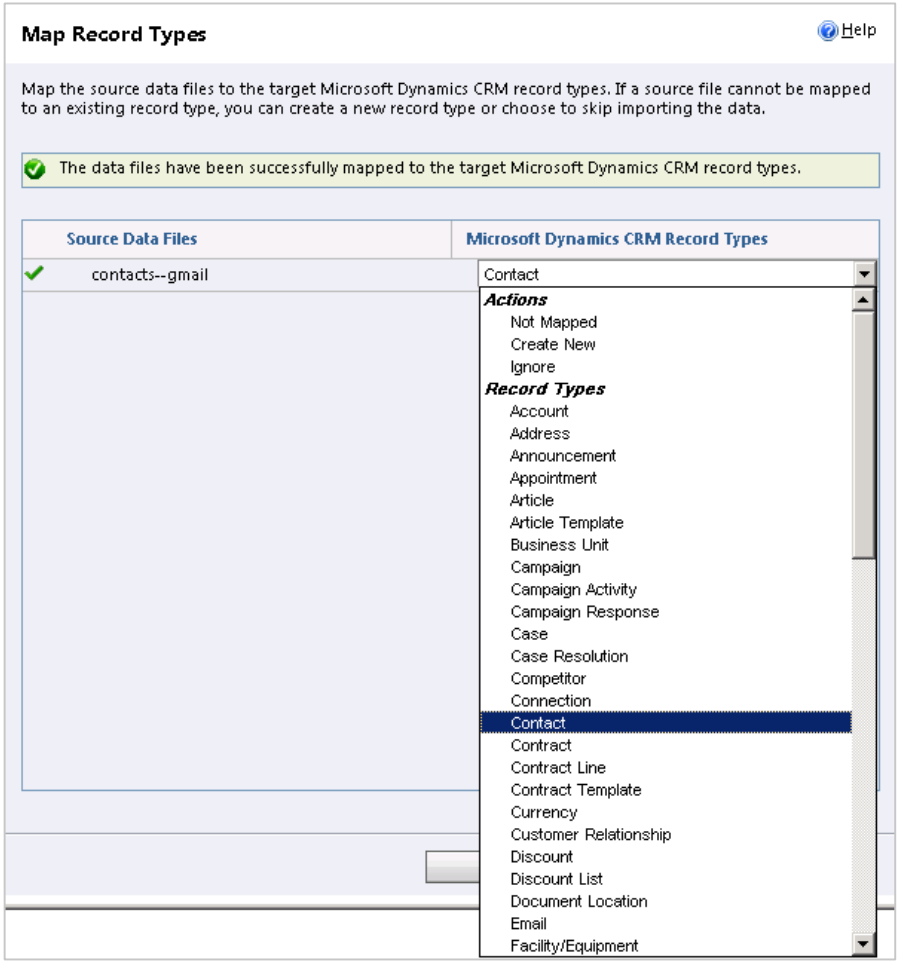

map the fields

6. 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**.

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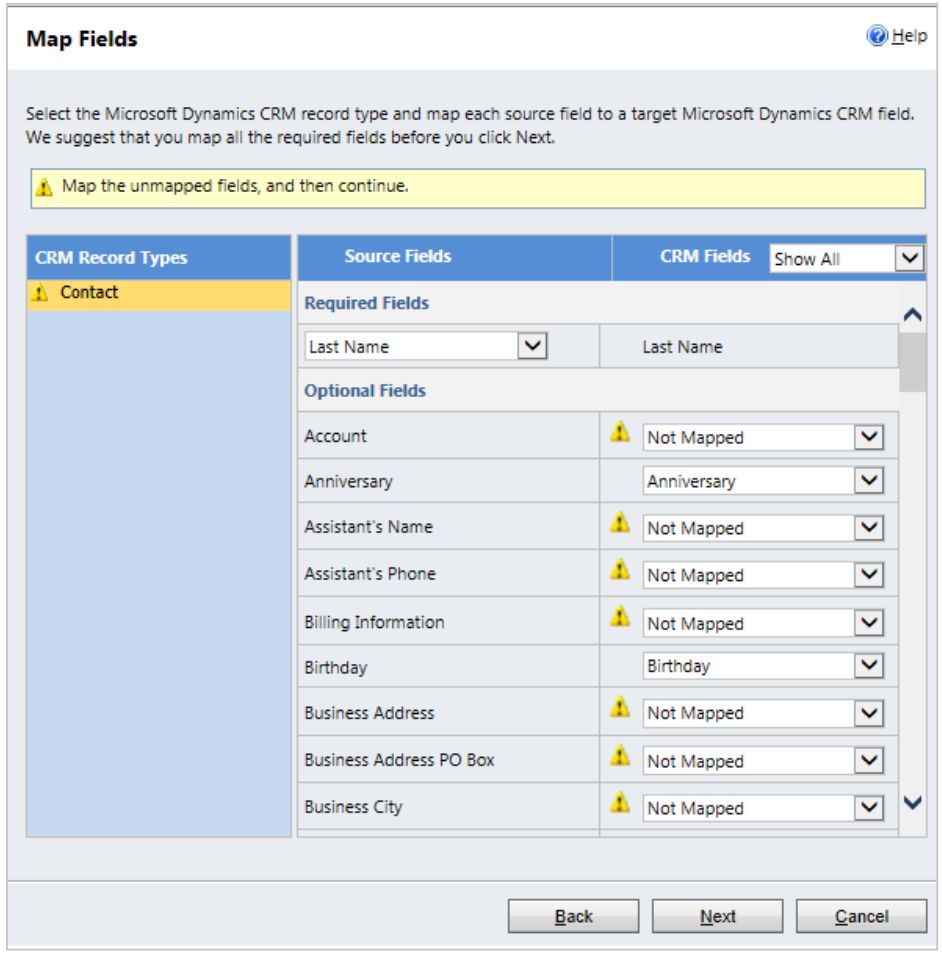
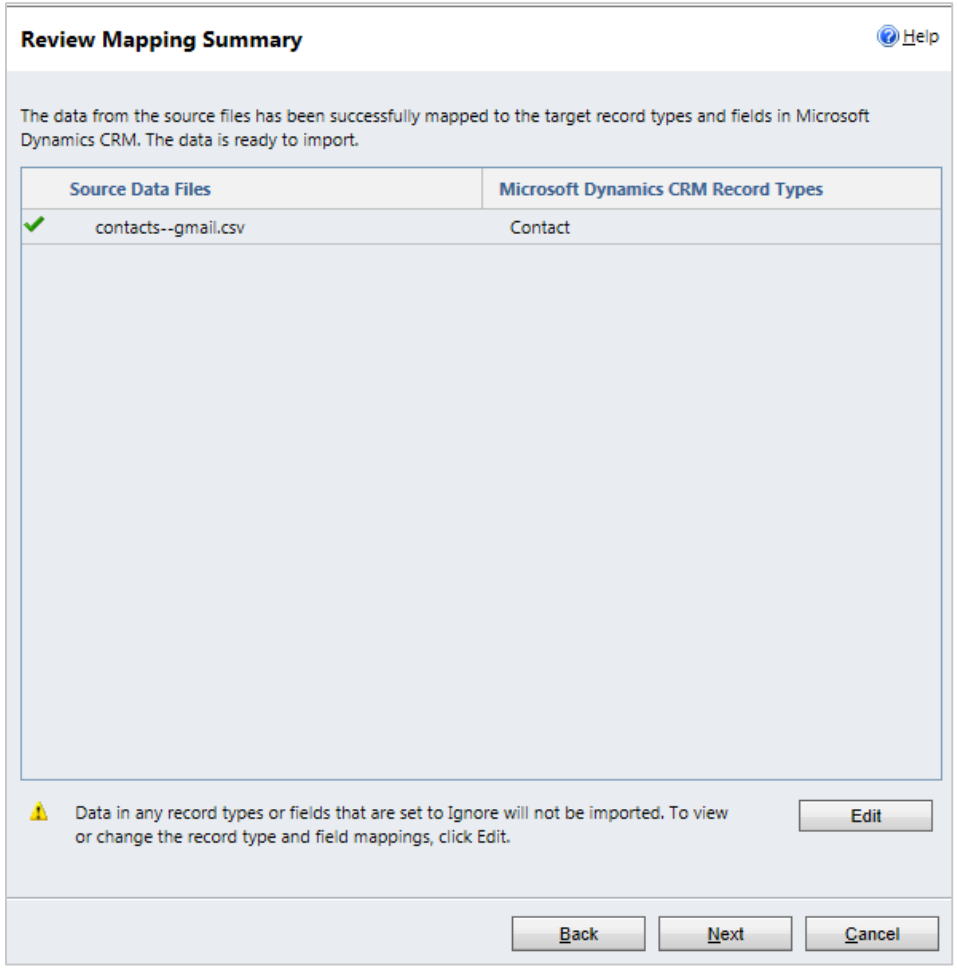


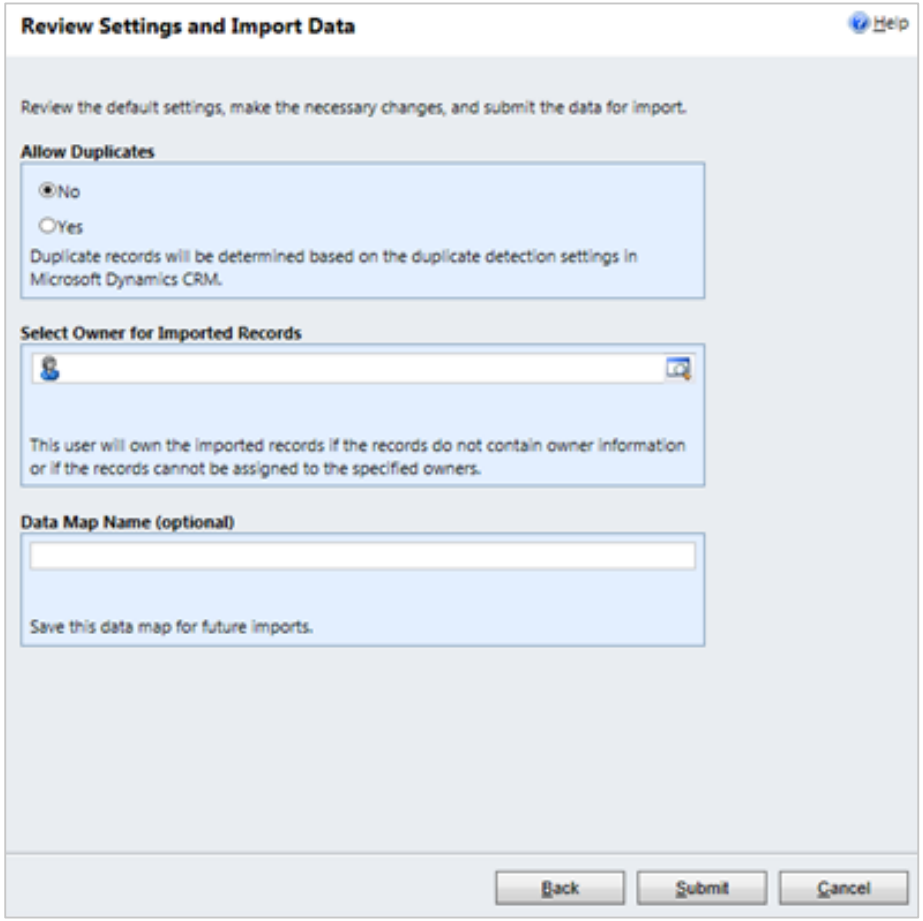
check the summary

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



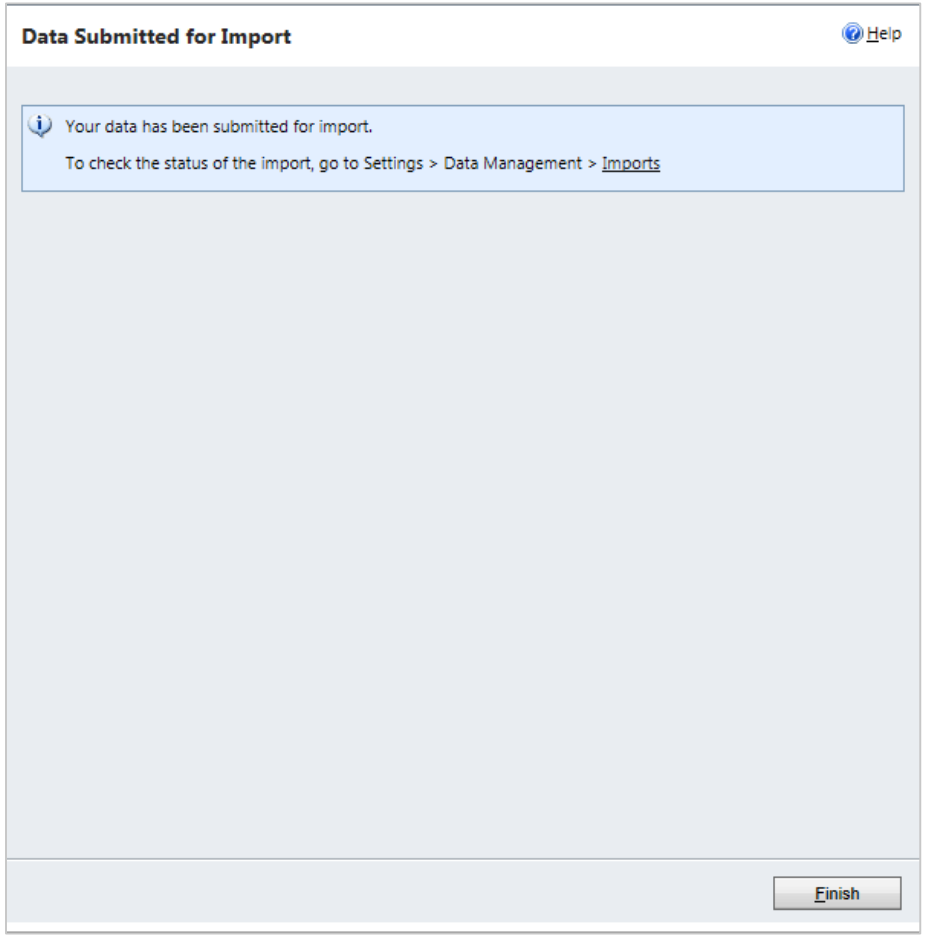
submit the import file

8. Click or tap **Submit**.



verify the import

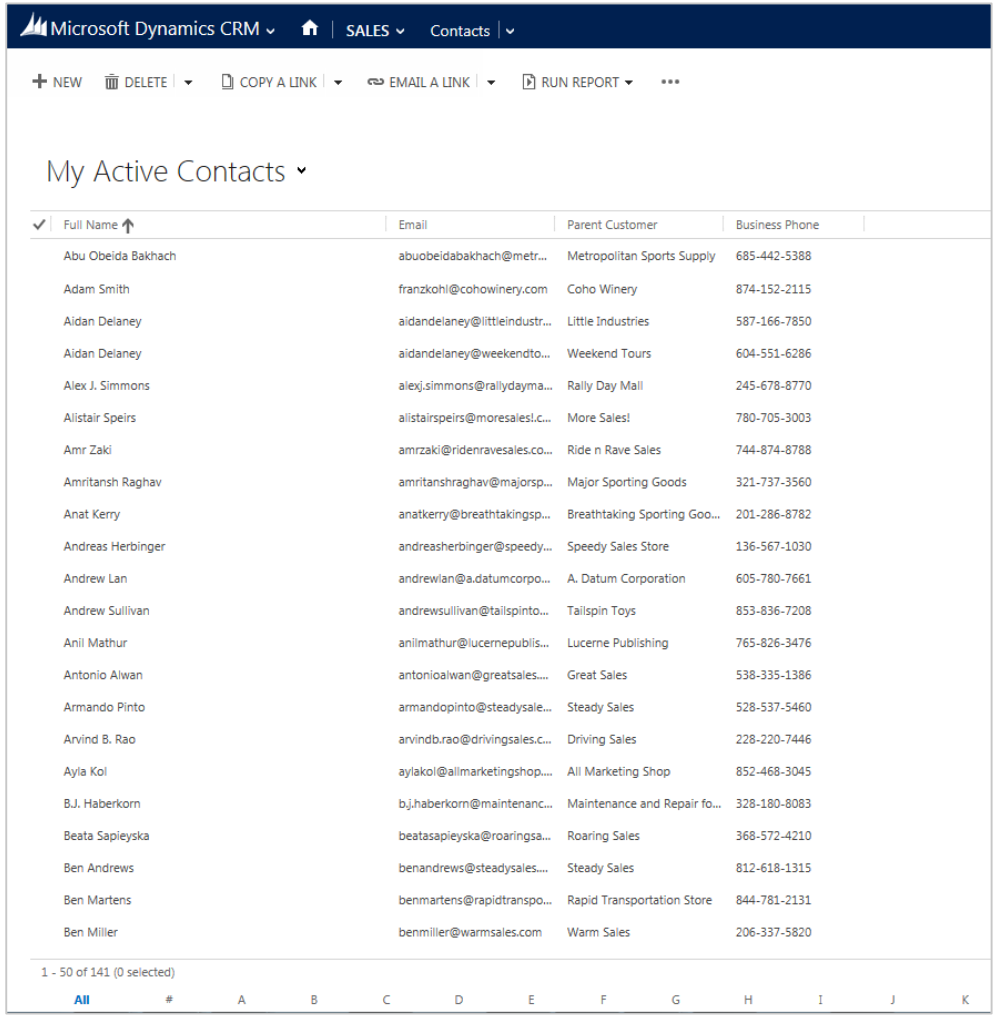
9. To verify that the wizard was successful, click or tap **Imports**, then review the report. Otherwise, click or tap **Finish**.



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.



That's it!

Thanks for reading!

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