



Importing Data into CRM

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Importing client data into CRM begins with proper preparation.

If your data is in a CSV format, check out these [tips for preparing a CSV file](#).

After the file is properly prepared, log into ESP Web. Then, click on the CRM tab. In the CRM section, click on the Import button.

The screenshot shows the ESP Web interface. At the top, there are navigation tabs for 'ESP Web', 'Websites Admin', 'CRM', 'Orders', and 'Email Marketing'. Below these are sub-tabs for 'Companies', 'Contacts', 'Emails', 'Notes', 'Tasks', 'Appointments', and 'Designs'. The 'CRM / Companies' breadcrumb is visible. The main heading is 'Companies'. Below it are filters for 'All Companies', 'Customers', 'Suppliers', 'Decorators', and 'Prospects'. There is a search bar with the text 'Search for address, phone, etc.', a dropdown menu set to 'By Name', a 'Filters' button, and a 'Clear Filters' button. On the right side, there are two buttons: '+ Add' and 'Import'. A blue arrow points to the 'Import' button.

The first step to select the type of file you would like to import.

The screenshot shows the 'Import your Data' dialog box. On the left, there is a sidebar with various menu items: 'Import', 'Notifications', 'Relationships', 'Teams', 'Users', 'Default Item Visibility', 'Company Profile', 'Emails', and 'Document Design'. The 'Import' button is highlighted with a blue arrow. The main content area is titled 'Import your Data'. Below the title, there is a question 'Where is your data now?' followed by five buttons: 'CSV', 'Outlook', 'Google', 'IIF', and 'vCard'. The 'CSV' button is circled in blue. Below the buttons, there is a section titled 'Importing Data and Your Privacy' with a shield icon and the text: 'Your personal CRM and Order data is yours. Your information won't be accessed, reviewed or shared with anyone outside of our secure data center unless you provide permission.' There is a 'Learn More' link below this section.

If you are working with a CSV, Outlook or Google file, choose whether you are importing Companies or Contacts. If your data file contains both company and contact information, select Companies. Then, click on the Choose File button to browse your computer for the data file you want to import.

Import your Data [?]

By uploading a CSV file with your companies or contacts you can map the columns to existing company/contact fields. Please make sure each column in your CSV contains a heading.

Upload your companies or contacts in a single CSV file to get started.

What are you importing? Companies Contacts

Select your CSV file: Check file for conflicts before importing into CRM
 No file chosen

If you are working with an IIF or vCard file, you can use the dropdown to select the record owner and then click on the Choose File button to browse your computer for the data file you want to import.

Import your Data [?]

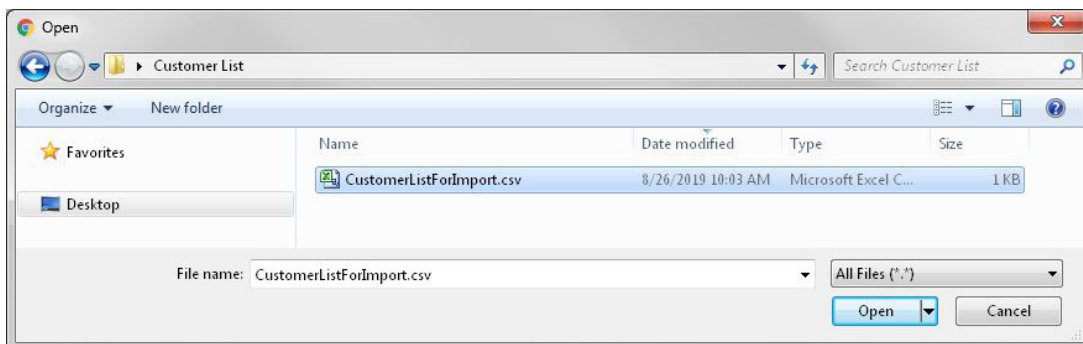
Import your QuickBooks customers and vendors using QuickBooks IIF file format to create your companies and contacts in CRM.

Upload your customers or vendors in a single IIF file to get started.

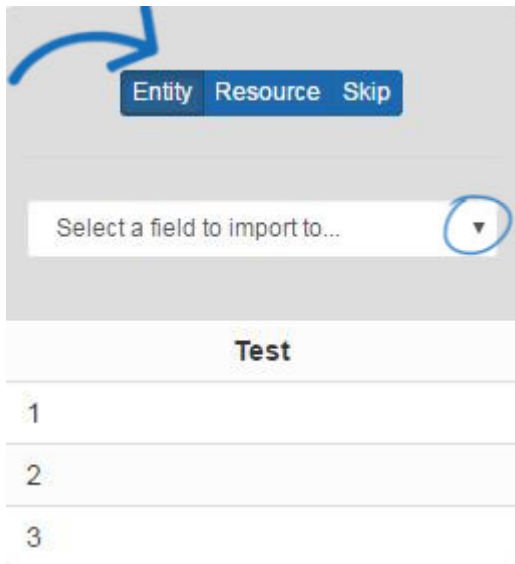
Record Owner

Select your IIF file: Check file for conflicts before importing into CRM
 No file chosen

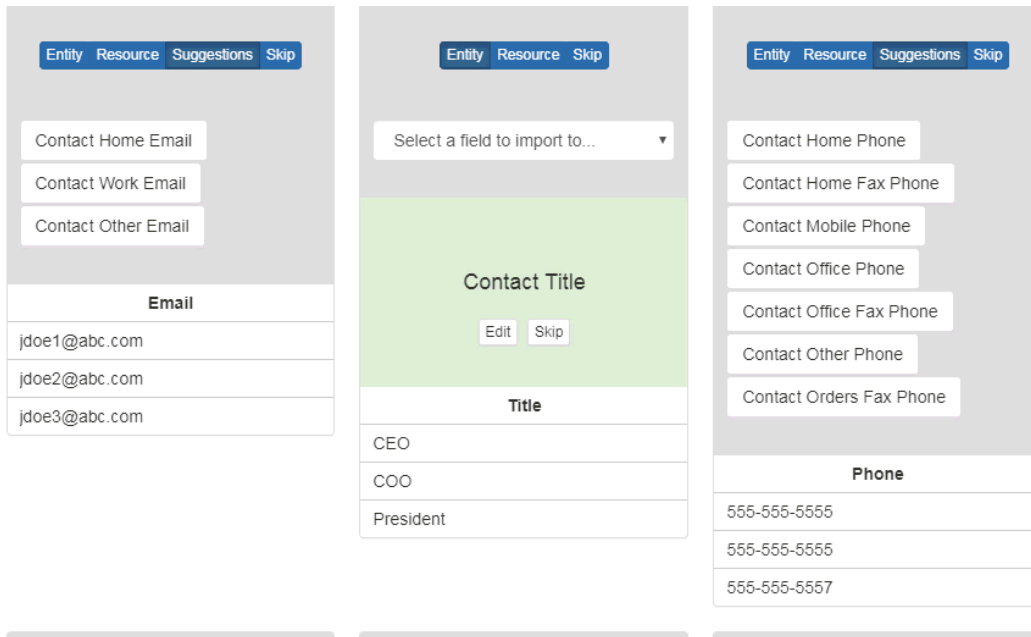
Locate the file on your computer, select it and then click on Open. The file will upload and all columns will be available for mapping.



Each column from the data file will need to be mapped to a location within CRM. Fields that have been automatically mapped will display with a green background. To change the field to which the column has been mapped, click on the Edit button and then use the Entity and Resource options to select a field. An entity is a general field, such as company address or contact first name. A resource is a more specific field, such as a Company Email or Contact Tag.



Columns which have not been automatically mapped will display with a gray background with a blue toolbar for mapping. Suggestions will display with clickable field options. Click on an option to map the column to that field.



If there is a field in the uploaded file which you do not want to map, click on the Skip option.

After all of the fields have been mapped, click on the Complete Import button.

First Name	Last Name	Work Email
John	Doe	jdoe@abc.com
Thomas	Smith	tsmith@def.com
Anna	Williams	awilliams@ghi.com

Record Owner (Person responsible for this record)
ESP User (Me)

Complete Import

Once all of the information has been imported, you will see a pop-up notification in the lower right corner of your screen.

Related Content

- [Contacts In CRM](#)