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Portal > Knowledgebase > CRM > Importing Data into CRM

Importing Data into CRM

Wendy D - 2019-07-05 - in CRM

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 CRM interface. The top navigation bar includes 'esp', 'ESP Web', 'Websites Admin', 'CRM', 'Orders', and 'Email Marketing'. Below this is a sub-menu with 'Companies', 'Contacts', 'Emails', 'Notes', 'Tasks', 'Appointments', and 'Designs'. The main content area is titled 'Companies' and includes tabs for 'All Companies', 'Customers', 'Suppliers', 'Decorators', and 'Prospects'. There is a search bar, a 'By Name' dropdown, and a 'Filters' button. A blue arrow points to the 'Import' button in the top right corner of the 'Companies' section.

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




The screenshot shows the 'Import your Data' dialog box. The 'Import' button is highlighted in the left sidebar. The main area is titled 'Import your Data' and asks 'Where is your data now?'. There are five buttons: 'CSV', 'Outlook', 'Google', 'IIF', and 'vCard'. The 'CSV' button is circled in blue. Below the buttons is a section titled 'Importing Data and Your Privacy' with a lock icon and 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 [?]


i By uploading a CSV file with your companies or contacts you can map the columns to 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: 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 [?]

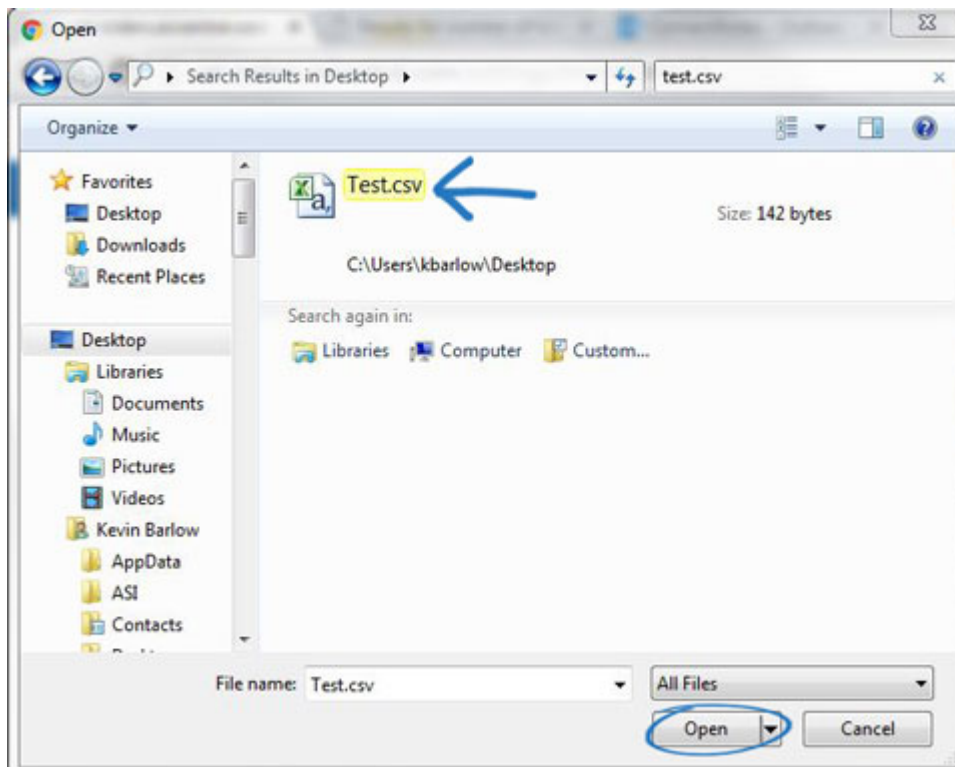
i Import your QuickBooks customers and vendors using QuickBooks IIF file format to create your companies and contacts in CRM.

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

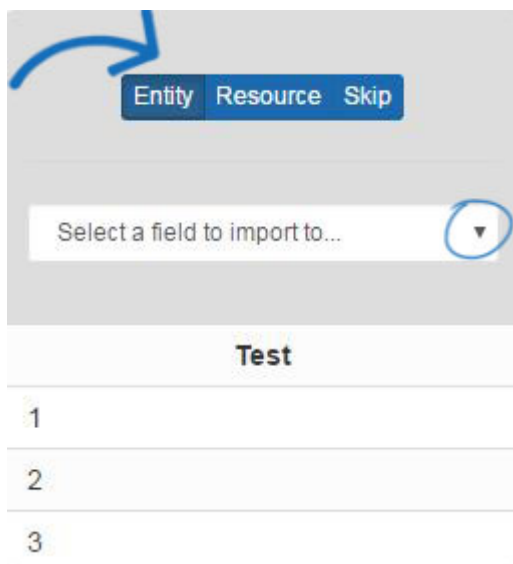
Record Owner

Select your IIF file: 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.

Entity Resource **Suggestions** Skip

Contact Home Email

Contact Work Email

Contact Other Email

Email
jdoe1@abc.com
jdoe2@abc.com
jdoe3@abc.com

Entity Resource Skip

Select a field to import to...

Contact Title

Edit Skip

Title
CEO
COO
President

Entity Resource **Suggestions** Skip

Contact Home Phone

Contact Home Fax Phone

Contact Mobile Phone

Contact Office Phone

Contact Office Fax Phone

Contact Other Phone

Contact Orders Fax Phone

Phone
555-555-5555
555-555-5555
555-555-5557

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

Entity Resource Skip

Select a field to import to...

Contact ID

Edit Skip

User Id

Entity Resource Skip

Select a field to import to...

Contact First Name

Edit Skip

First Name
John
Jane
Jennifer

Entity Resource Skip

Select a field to import to...

Contact Last Name

Edit Skip

Last Name
Doe
Doe
Doe

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

The screenshot displays a data import interface with five panels. The top-left panel is titled "Company Name" and includes a "Common" section with "Edit" and "Skip" buttons. Below this is a table with a "Test" header and three rows numbered 1, 2, and 3. The other four panels are identical in layout, each featuring a "Select a field to import to..." dropdown menu, a "Test" header, and a table with three rows numbered 1, 2, and 3. At the top of each of these four panels are buttons for "Entity", "Resource", and "Skip". A blue arrow points from the right side of the interface towards a "Complete Import" button located in a dark bar at the bottom right.

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