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## Preparing Your Data for Import into CRM

Wendy D - 2018-07-03 - in CRM

When using a CSV file for importing data, here are a few important tips:

### Review the Fields in CRM First

When working with files containing many files, it is important to note the available fields for companies and contacts in CRM prior to importing. To view the fields available for companies, click on the CRM tab in ESP and then click on the Add button.

The screenshot shows the ESP CRM interface. At the top, there is a navigation bar with tabs for 'ESP Web', 'Websites Admin', 'CRM', 'Orders', and 'Email Marketing'. Below this is a sub-navigation bar with tabs for 'Companies', 'Contacts', 'Emails', 'Notes', 'Tasks', 'Appointments', and 'Designs'. The 'CRM' tab is selected. In the main content area, the 'Companies' section is displayed. It includes a search bar, a dropdown menu for 'All Companies' (with options for Customers, Suppliers, Decorators, and Prospects), a search input field with the placeholder 'Search for address, phone, etc.', a dropdown menu for 'By Name', a 'Filters' button with a notification icon, and a 'Clear Filters' button. On the right side, there are '+ Add' and 'Import' buttons.

To view the fields available for contacts, click on the CRM tab and then click on Contacts from the toolbar. Then, click on the Add button.

For example, if a column within the data sheet is for "Market", it can be mapped to the Notes field within CRM.

### Use Appropriate Headings

The heading on the data columns should distinguish the type of information that is contained within the column. For example, if the file contains company contact information, use "company" in front of the type of data, such as "company address" or "company zip". Doing so enables the ESP CRM system to better identify between company and contact demographics.

	A	B	C	D
1	<u>Company Name</u>	Company Address	Company Zip	
2	Test Company 1	1 Main Street	55555	
3	Test Company 2	2 Main Street	66666	
4	Test Company 3	3 Main Street	77777	
5	Test Company 4	4 Main street	88888	
6				

### Separate the First and Last Names of Contacts

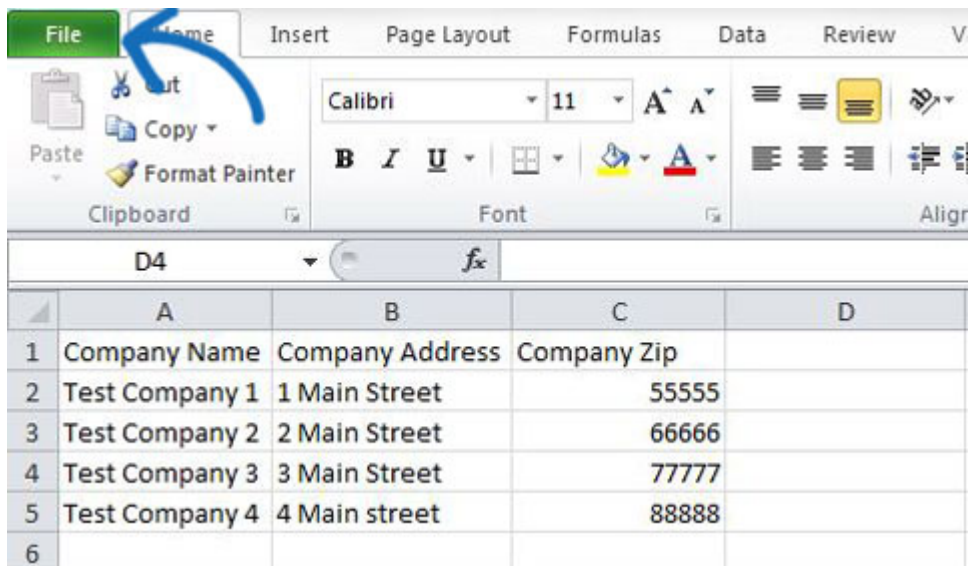
Put contact first names in one column and their last names in a separate one.

	A	B	C
1	<u>First Name</u>	<u>Last Name</u>	
2	John	Doe	
3	Jane	Doe	
4			

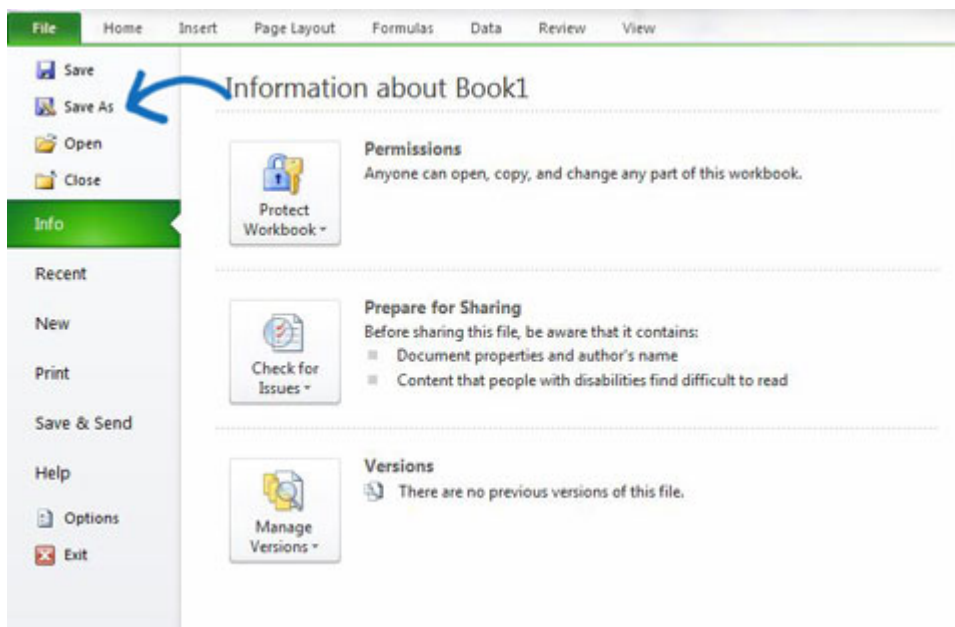
If the data contains full names within a single column, you will need to [separate the name into two columns](#).

### Save as CSV

To save a spreadsheet as a .CSV file, click on the File tab.



Click on Save As.



Use the "Save as type" dropdown to select "CSV (MS-DOS) (\*.csv)".

