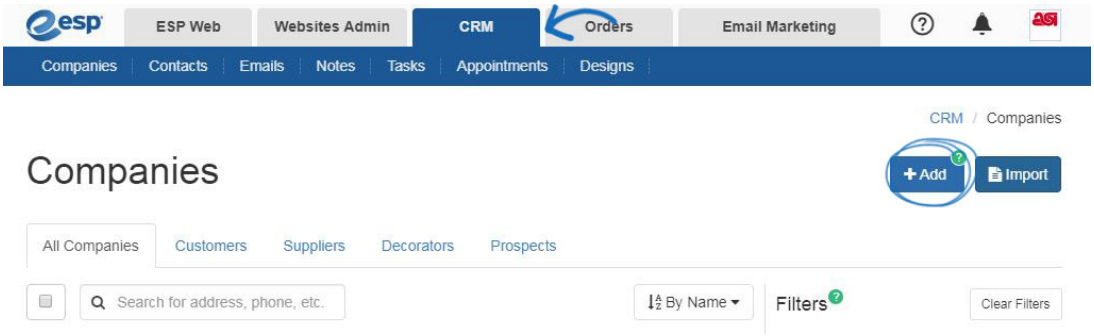
Preparing Your Data for Import into CRM

Wendy Dujmovic - 2018-07-03 - 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.



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	Company Name	Company Address Name	Company Address Street	Company City
2	ABC Company	Main Location	4800 Street Road	Trevose
3	DEF Company	Main Location	123 Example Street	Trevose
4	GHI Company	Main Location	456 Example Street	Trevose

Separate the First and Last Names of Contacts

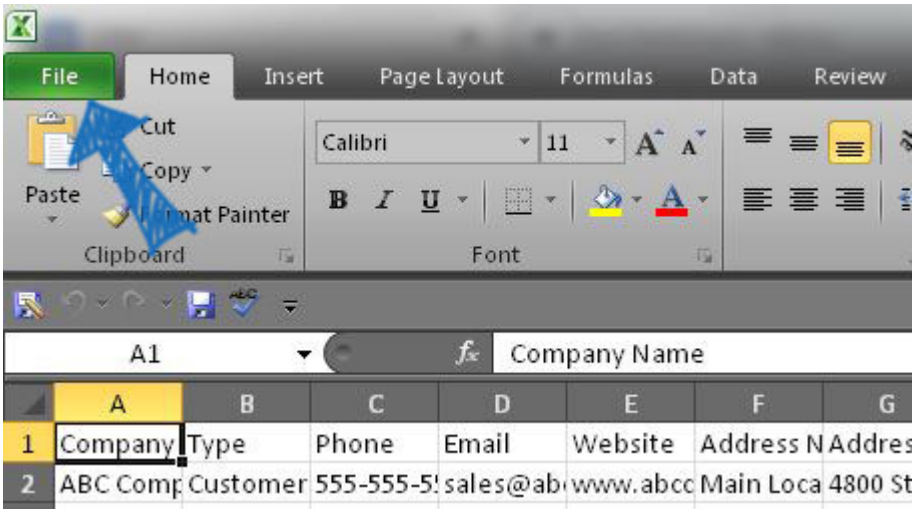
Put contact first names in one column and their last names in a separate one.

M	N	O
Contact First Name	Contact Last Name	Contact email
John	Doe	jdoe@abc.com
Thomas	Smith	tsmith@def.com
Anna	Williams	awilliams@ghi.com

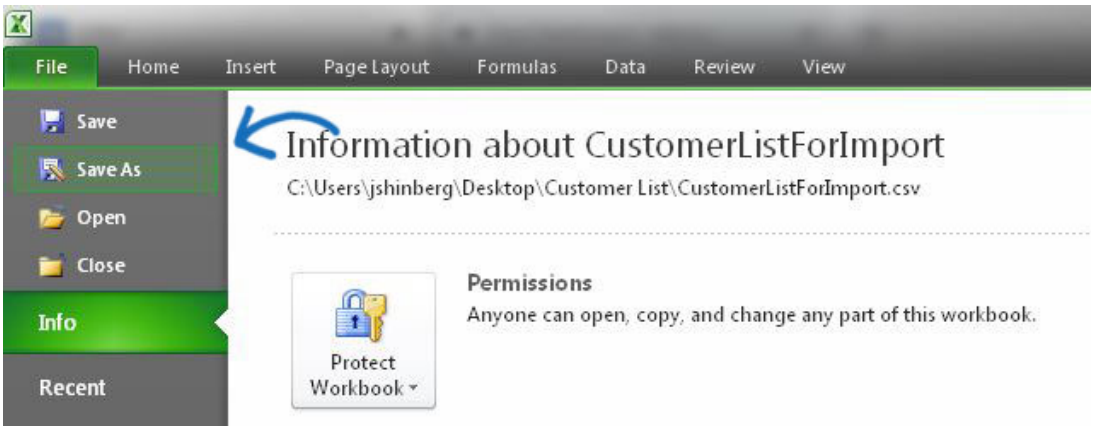
If the data contains full names within a single column, you will need to separate the name into two columns.

Save as CSV

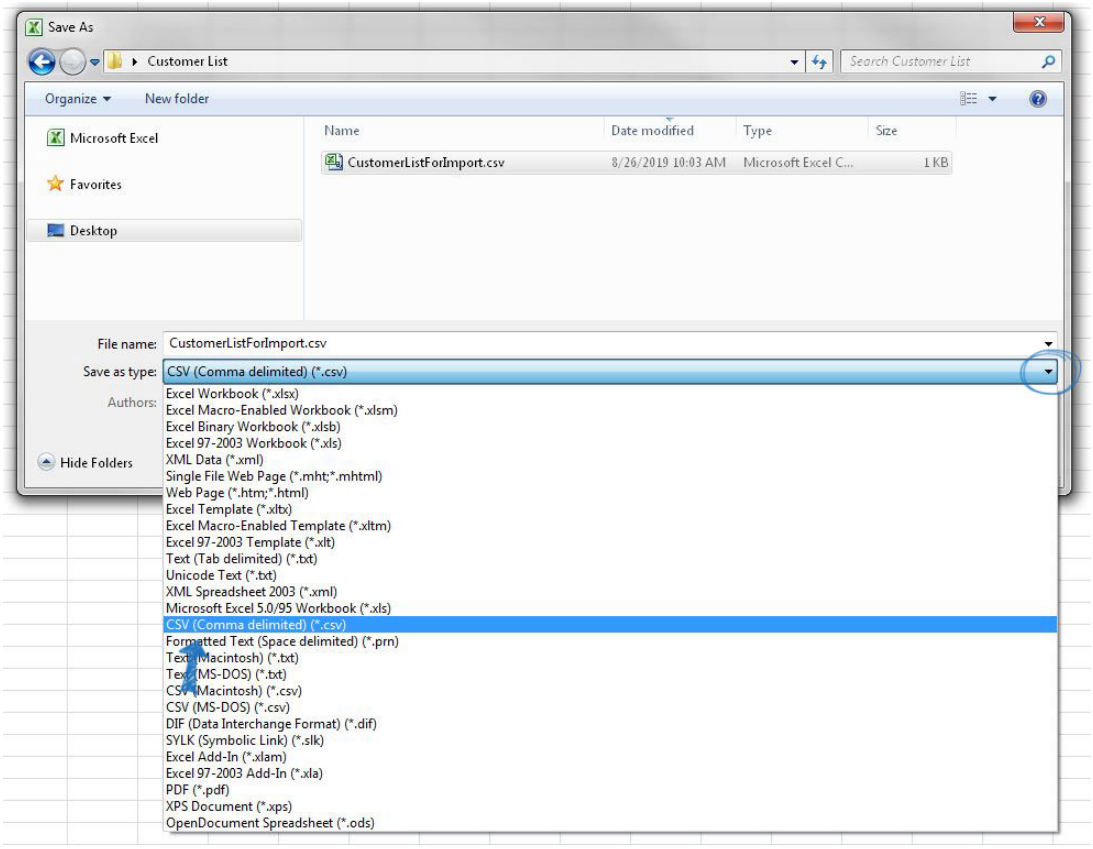
To save a spreadsheet as a .CSV file, click on the File tab.



Click on Save As.



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


Save As
Customer List
Search Customer List
Organize
New folder
Microsoft Excel
Favorites
Desktop
Name
Date modified
Type
Size
CustomerListForImport.csv
8/26/2019 10:03 AM
Microsoft Excel C...
1 KB
File name:
CustomerListForImport.csv
Save as type:
CSV (Comma delimited) (*.csv)
Authors:
Hide Folders
Excel Workbook (*.xlsx)
Excel Macro-Enabled Workbook (*.xlsm)
Excel Binary Workbook (*.xlsb)
Excel 97-2003 Workbook (*.xls)
XML Data (*.xml)
Single File Web Page (*.mht;*.mhtml)
Web Page (*.htm;*.html)
Excel Template (*.xltx)
Excel Macro-Enabled Template (*.xltm)
Excel 97-2003 Template (*.xlt)
Text (Tab delimited) (*.txt)
Unicode Text (*.txt)
XML Spreadsheet 2003 (*.xml)
Microsoft Excel 5.0/95 Workbook (*.xls)
CSV (Comma delimited) (*.csv)
Formatted Text (Space delimited) (*.prn)
Text (Macintosh) (*.txt)
Text (MS-DOS) (*.txt)
CSV (Macintosh) (*.csv)
CSV (MS-DOS) (*.csv)
DIF (Data Interchange Format) (*.dif)
SYLK (Symbolic Link) (*.slk)
Excel Add-In (*.xlam)
Excel 97-2003 Add-In (*.xla)
PDF (*.pdf)
XPS Document (*.xps)
OpenDocument Spreadsheet (*.ods)