



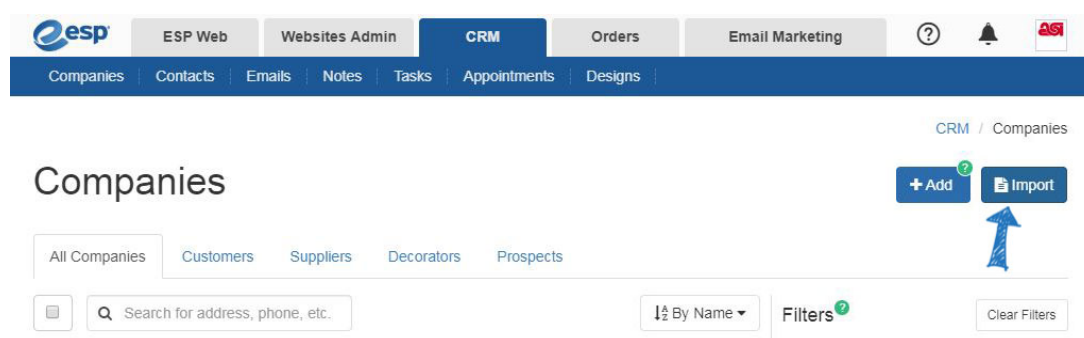
Importing Data into CRM

Wendy Dujmovic - 2019-07-05 - CRM

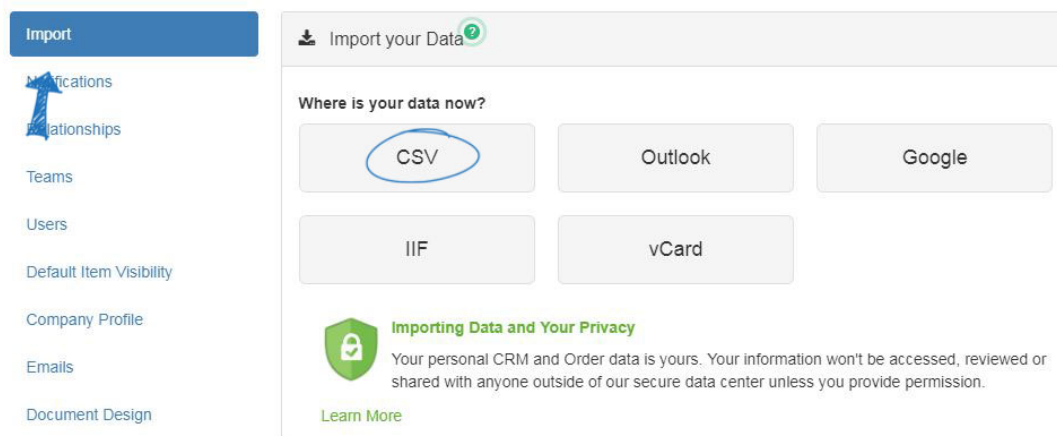
Importing client data into CRM begins with proper preparation.

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



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

Choose 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 ?

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

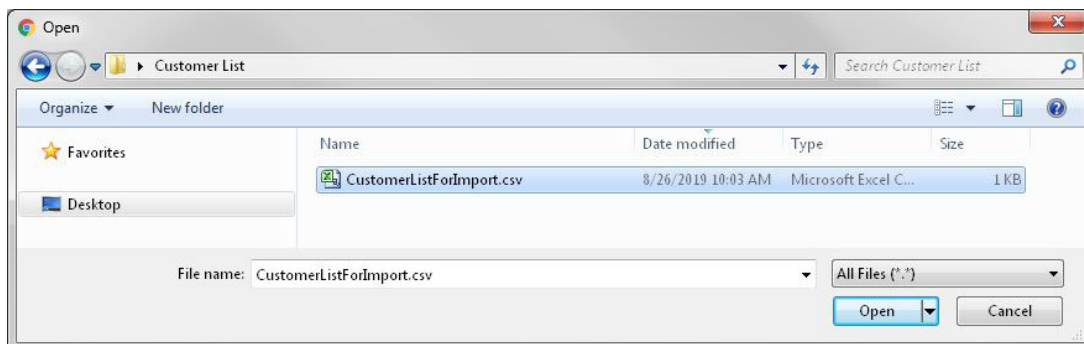
Upload your customers or vendors in a single IIF file to get started.

Record Owner

Select your IIF file: ☒ Check file for conflicts before importing into CRM

Choose 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.

Entity Resource Skip

Select a field to import to...

Test
1
2
3

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.

First Name

Common

Edit Skip

Contact First Name

John
Thomas
Anna

Last Name

Common

Edit Skip

Contact Last Name

Doe
Smith
Williams

Work Email

Suggest

Edit Skip

Contact email

jdoe@abc.com
tsmith@def.com
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](#)