Import contacts into CRM

Bring in your contacts from wherever you store them:

- Email
- Spreadsheets
- Your phone

Microsoft Dynamics

get ready to import your contacts

Whether your contacts are stored in an email program, a spreadsheet, or on your phone, you'll probably want to import them into Microsoft Dynamics CRM so you can keep track of the people you do business with all in one place.

Applies to: Microsoft Dynamics CRM Online, or Microsoft Dynamics CRM 2013 or 2015 (on-premises)

use supported file formats

First, you export your contacts into a file.

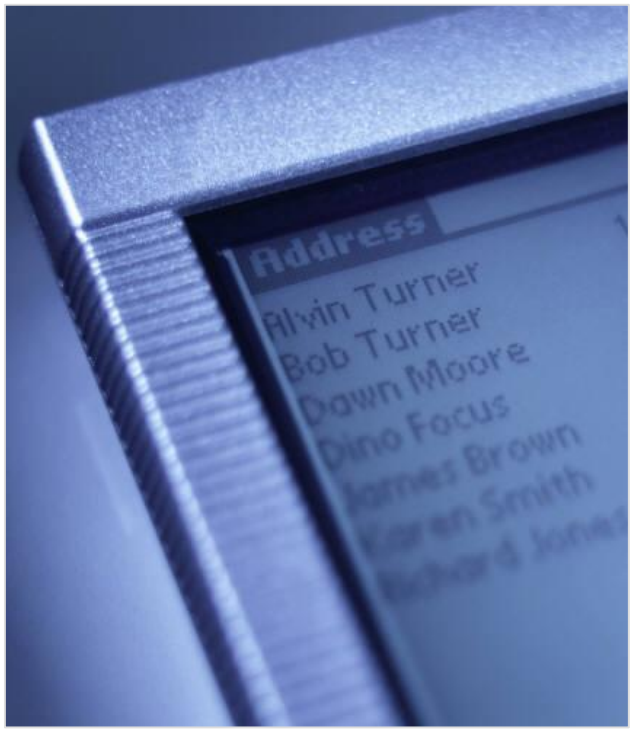
These file formats are supported:

- Comma-separated values (**.csv**)
- Text (**.txt**)
- Compressed (**.zip**)
- Excel Spreadsheet 2003 (**.xml**)

The maximum file size allowed for .zip files is 32 MB.

For the other file formats, the maximum file size allowed is 8 MB.

Tip: Use .zip If you store contacts in more than one program, add all your import files to a single .zip file. Then import the .zip file to bring in all the files at once.



export from email

Need to export contacts from an email program?

1. Export the contacts into a comma-separated values file (.csv).

   To find specific steps to export contacts from your email program, open the program's Help, and search for "export."

   Look for topics that include "exporting contacts" or "exporting your address book" or "export wizard" in the title.

2. Save the file in a location where you can find it easily later.

export from a spreadsheet

Need to export contacts from a spreadsheet?

1. Open the spreadsheet.
2. For best results, edit any column name in the spreadsheet to match exactly with the name shown here.
3. Save the file in a location where you can easily find it later.

Column Name in spreadsheet (spelling must match exactly)
First Name
Middle Name
Last Name
Business Phone
Mobile Phone
Job Title
Business Street
Business City
Business State
Business Postal Code
Business Country/Region
Email Address

Heads-up! If the spreadsheet doesn't include all the column names listed in this table, that's okay.

However, if a column name does exist, make sure it matches exactly with the corresponding name in the table.

Spaces are required. Note that the word "Email" doesn't contain a hyphen.

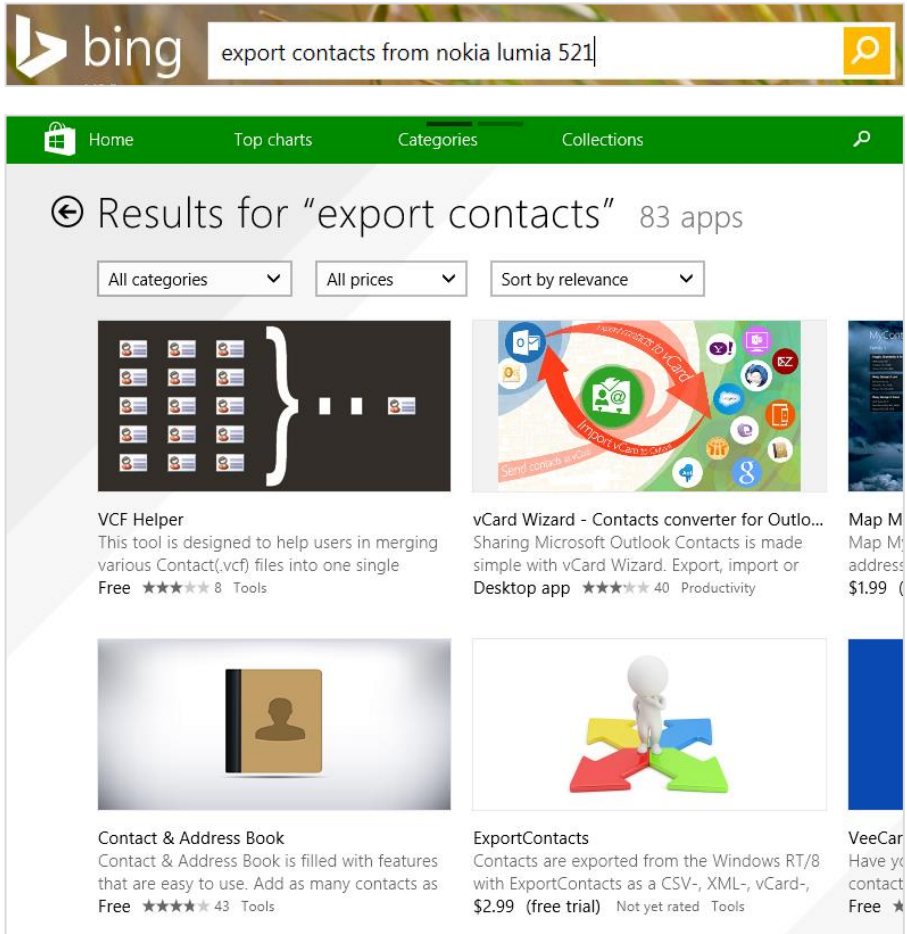
export from your phone

Need to export contacts from a phone?

- Use a USB cable or an app to export your contacts from your phone to your computer.

To find specific steps to export contacts for your brand of phone, search for “export contacts from my phone” in your favorite search engine (such as Bing).

To find an app, search your phone’s online store.



run the wizard

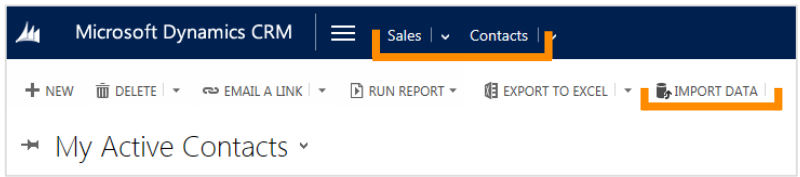
You'll use the Import Data wizard to import your contacts.

The steps to get to the wizard depend on the version you're using.

Tip for CRM admins: You'll find the Import Data wizard under **Settings** > **Data Management**.

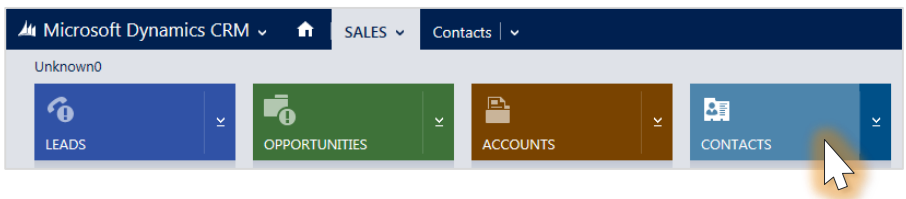
If your screen looks like this (latest version):

For **Sales**, **Service**, or **Marketing**, go to **Contacts.** Choose **Import Data**.



If your screen looks like this (older version):

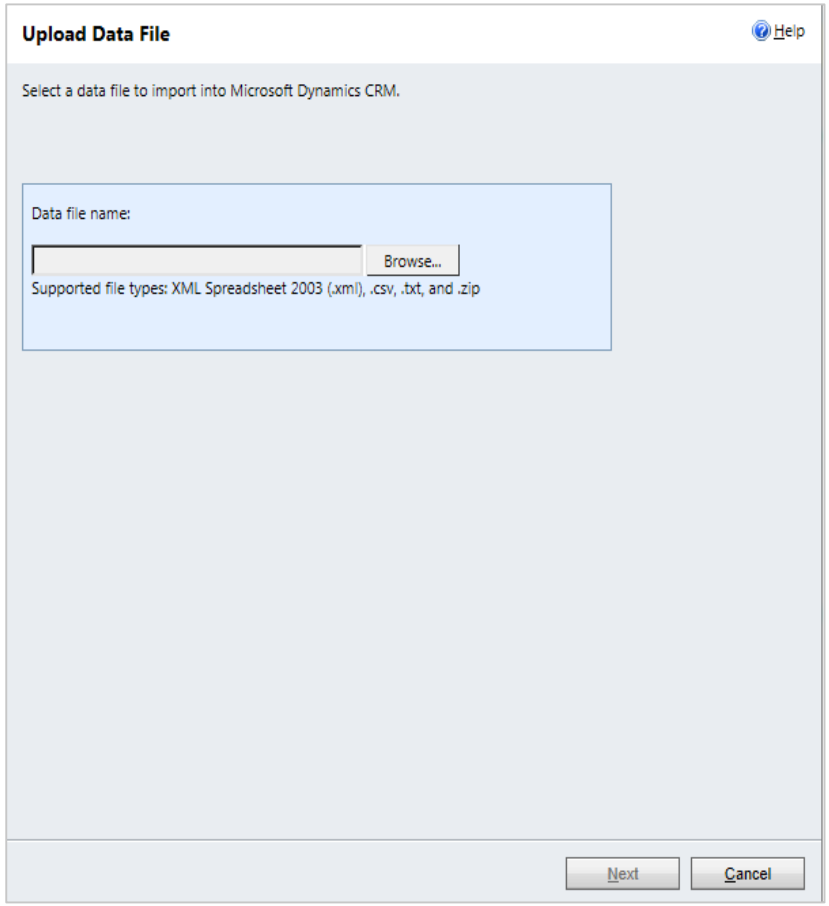
Choose **Microsoft Dynamics CRM** > **Sales, Service, or Marketing**. Go to **Contacts**. Then, choose **Imports** > **Import Data**.



select the file to import

Browse to the folder where you saved the file containing the export of your contacts.

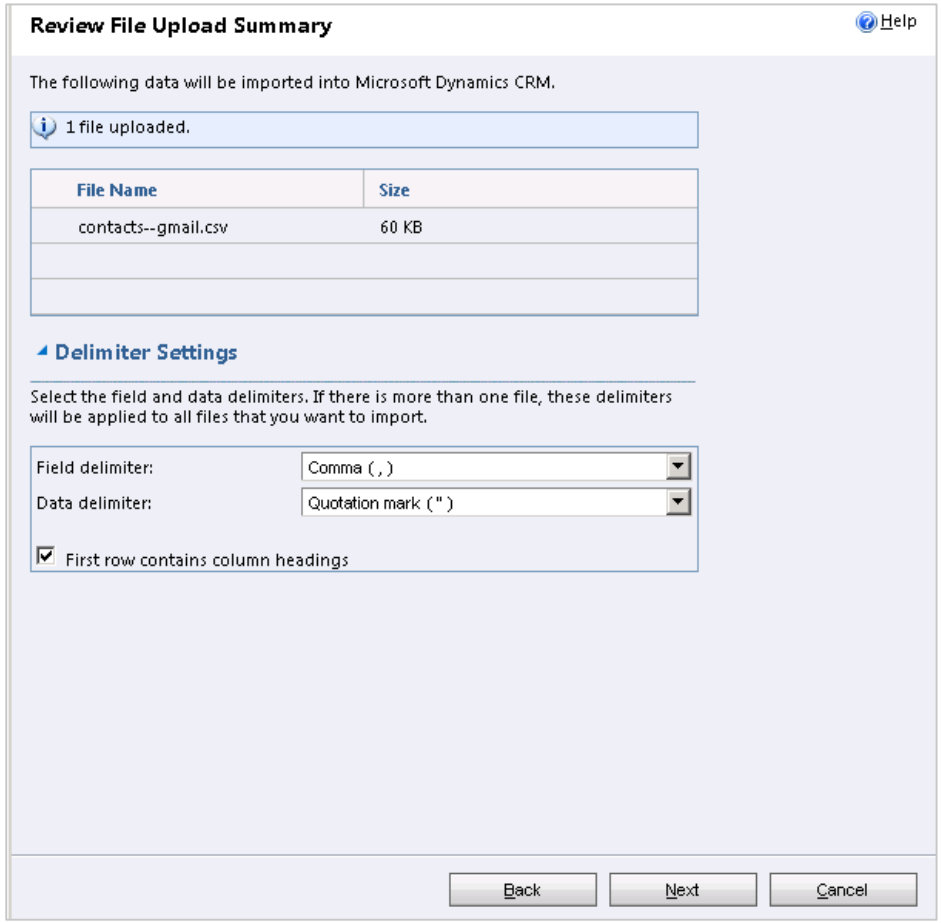
Select the file, then choose **Open**. Choose **Next**.



review the upload summary

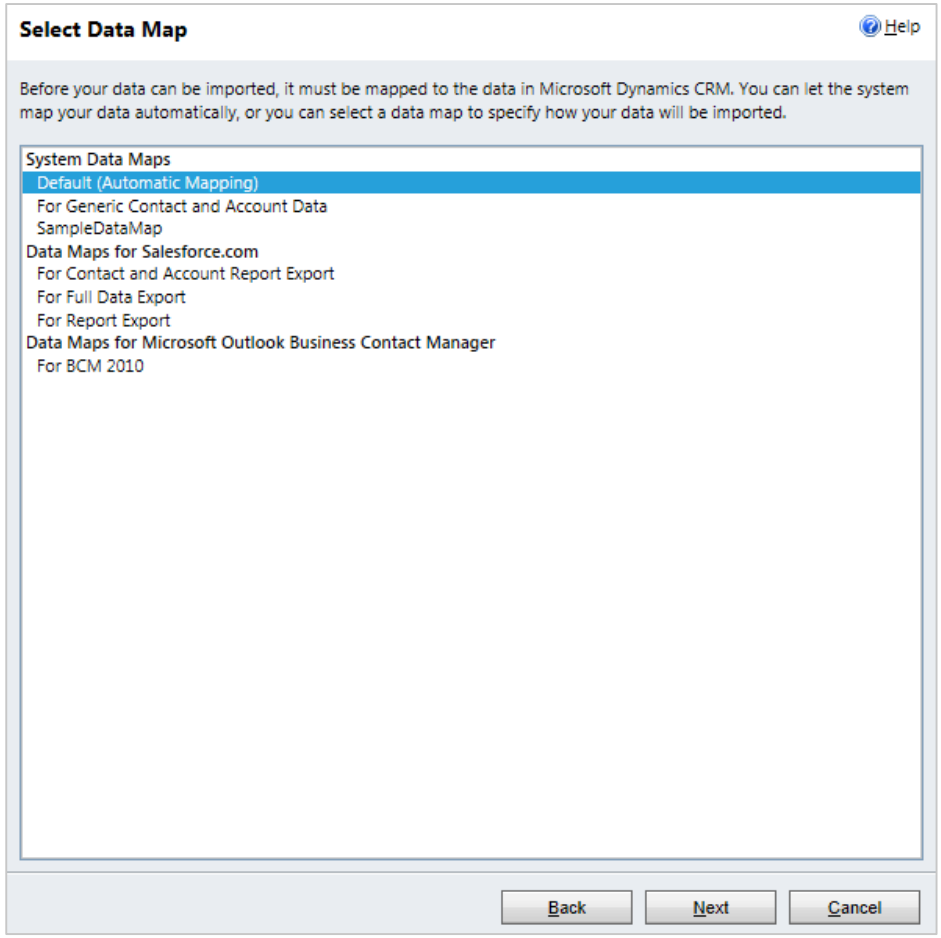
Review the file name, and if the file is in .csv or .txt format, verify that the field and data delimiters are correct. Choose **Next**.

Note: In most cases, you can accept the default delimiters.



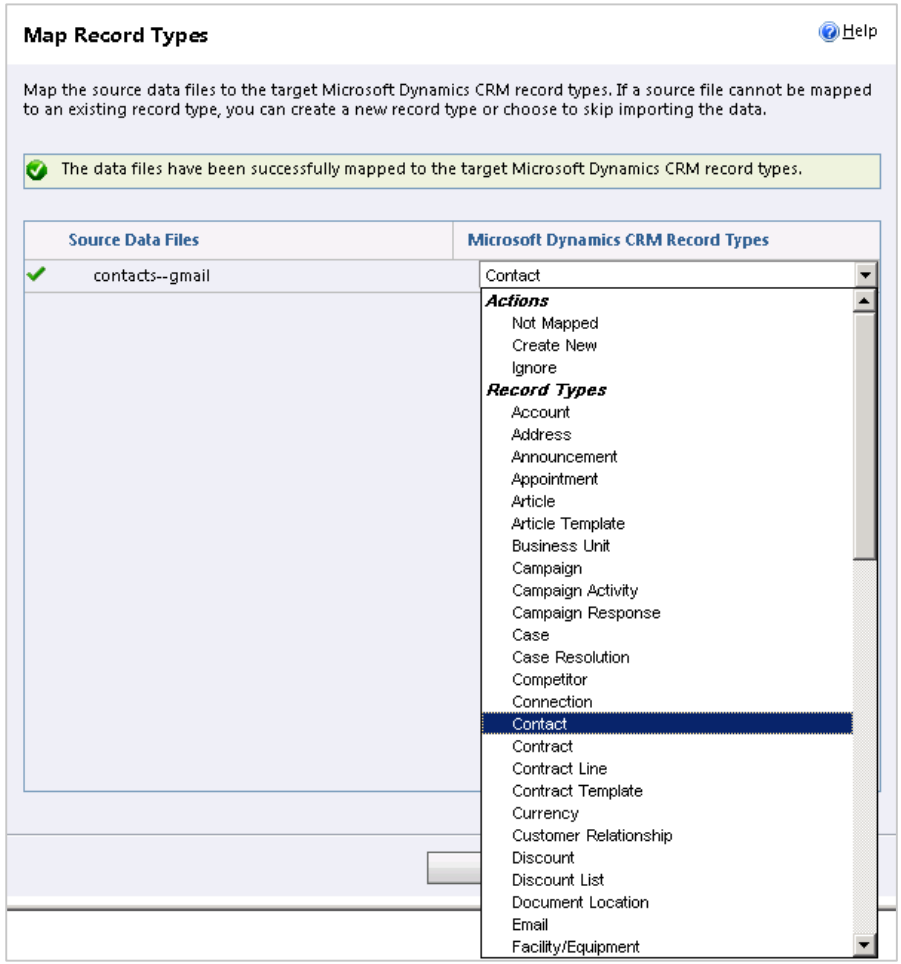
select automatic mapping

Select **Default (Automatic Mapping)** for the System Data Map. Choose **Next**.



select “contact” for the type of info

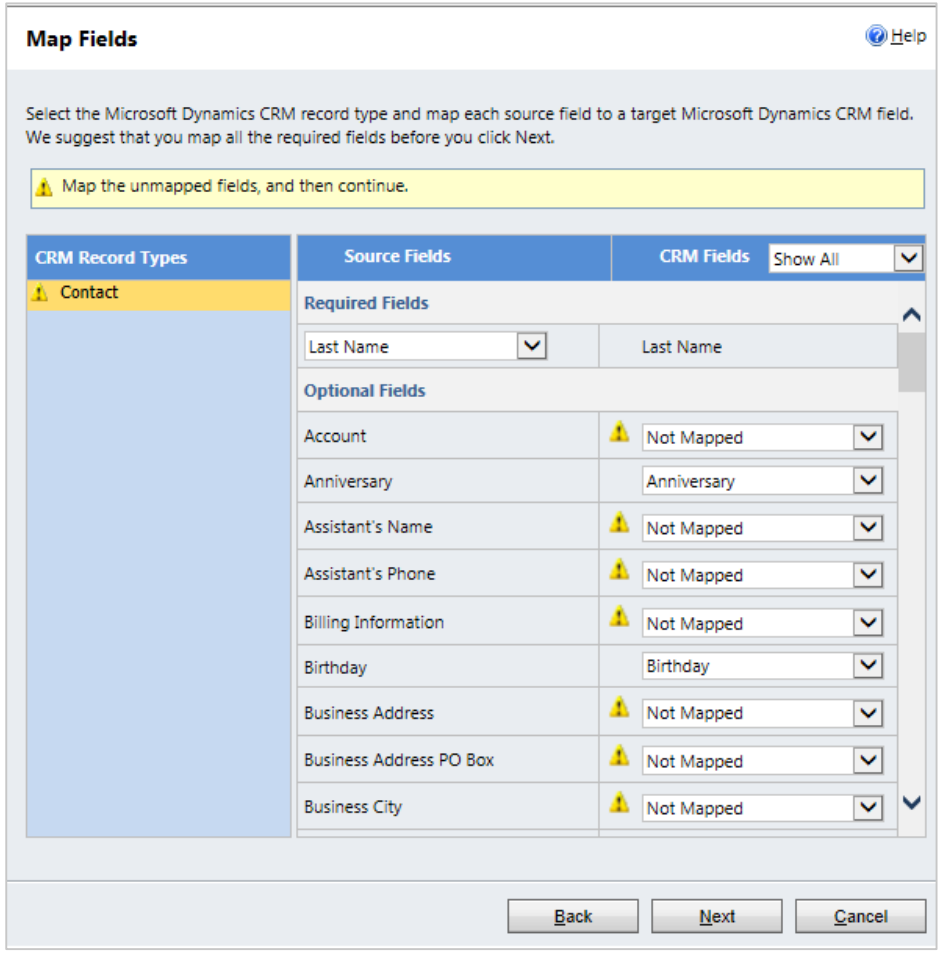
In the **Microsoft Dynamics CRM Record Types** drop-down list, select **Contact**. Choose **Next**.



map the fields

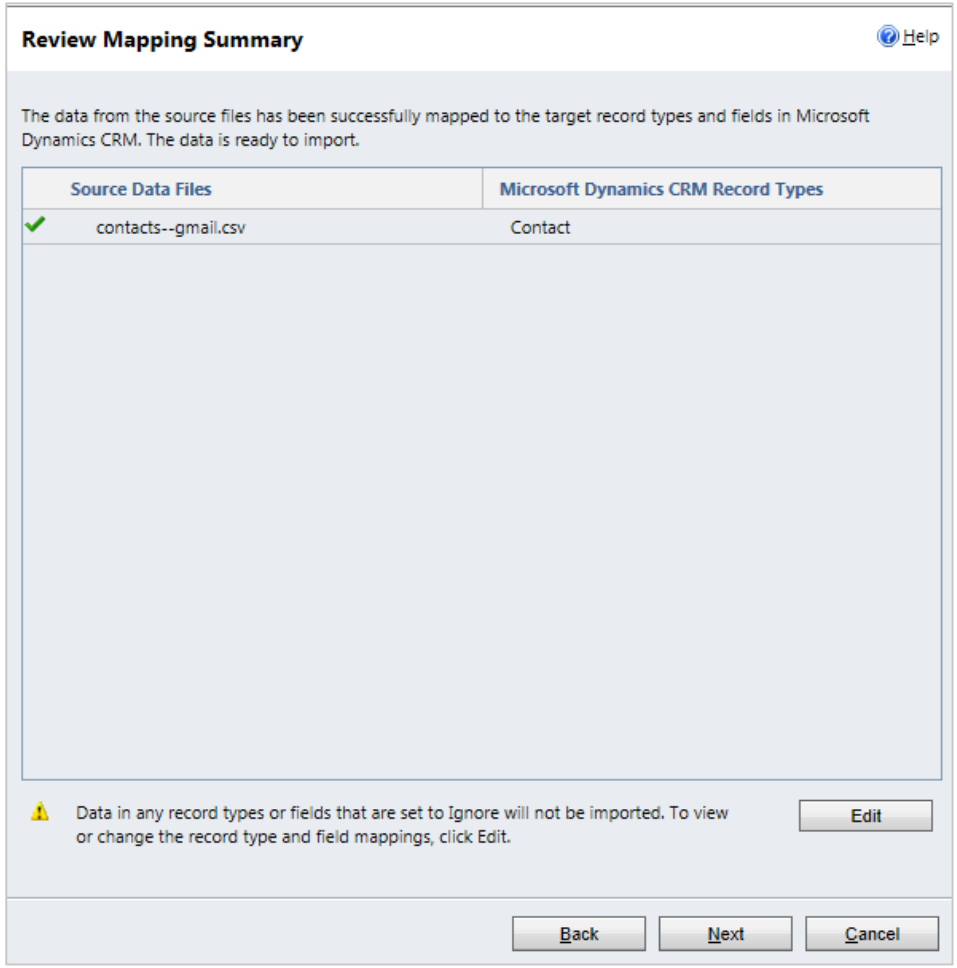
For any field name with an alert icon, map the column from your contacts file to the corresponding field in CRM.

Choose **OK**, then choose **Next**.



check the summary

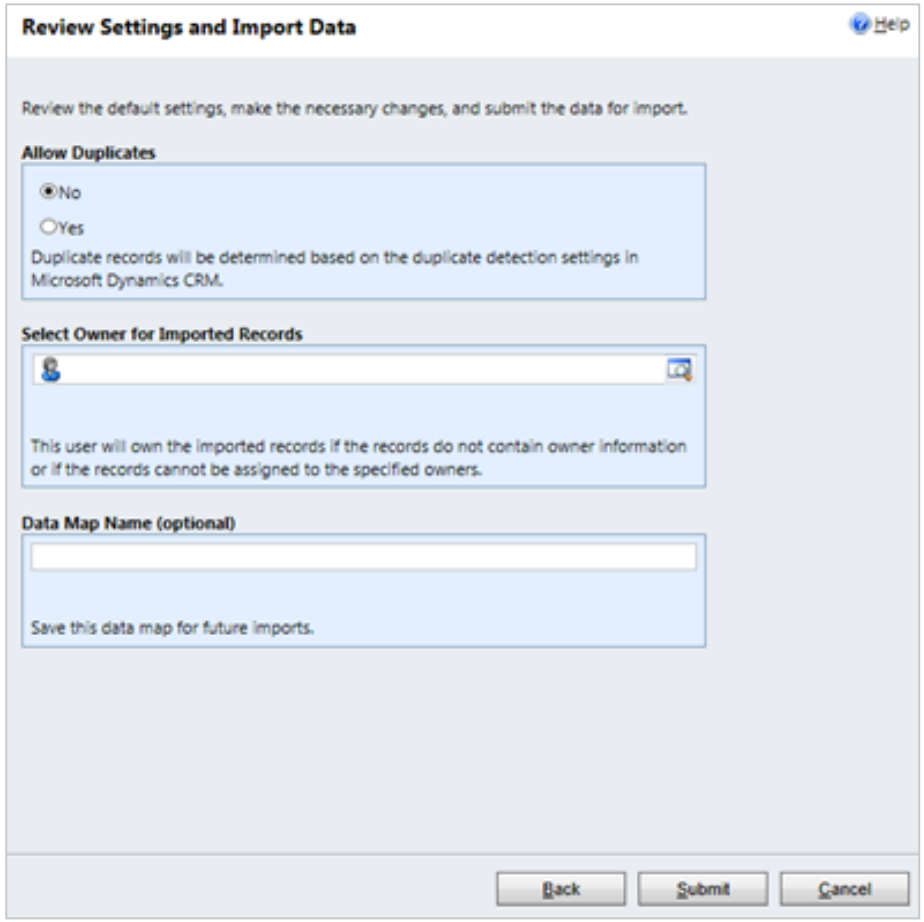
Review the summary, and then choose **Next**.



submit the import file

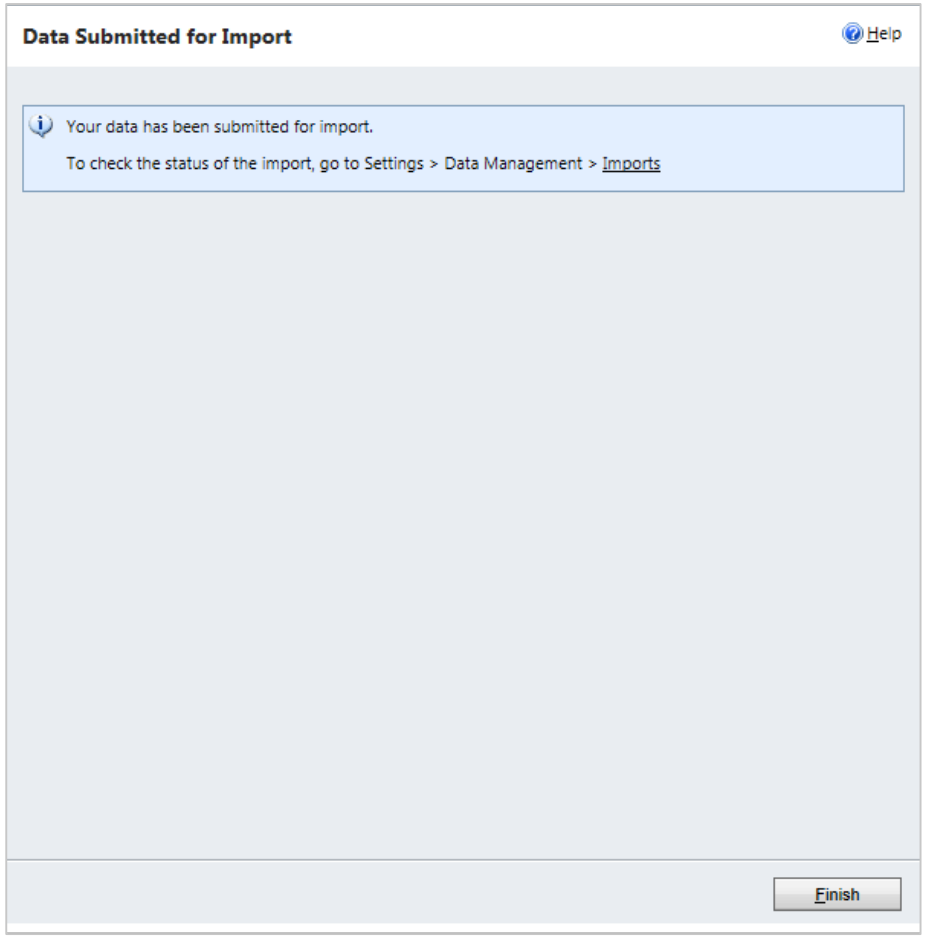
Choose **Submit**.

Note: In most cases, you can accept the defaults on this screen.



verify the import

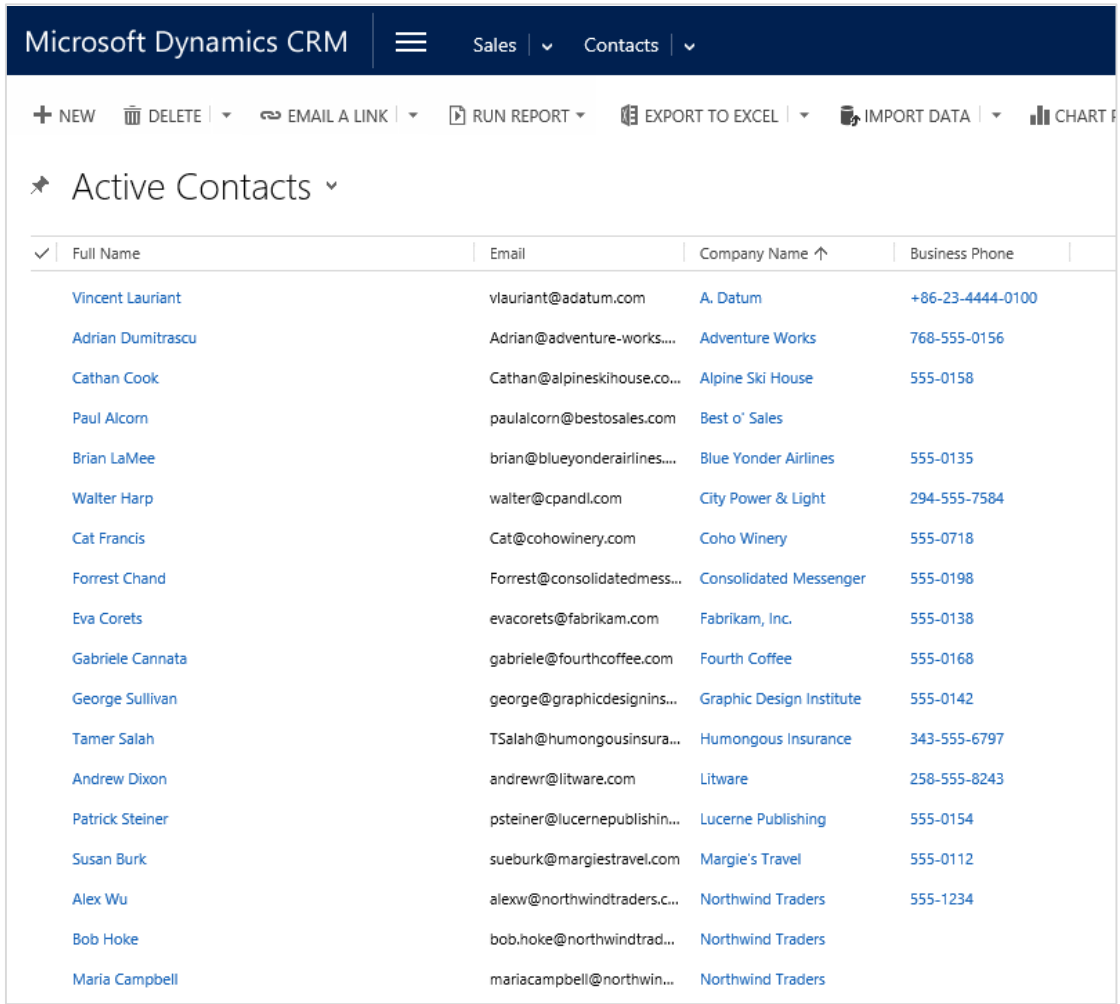
To verify that the wizard was successful, choose **Imports**, then review the report. Otherwise, choose **Finish**.



check for success

After you run the wizard, check your list of contacts in Microsoft Dynamics CRM to make sure they imported correctly.

1. For **Sales**, **Service**, or **Marketing**, go to **Contacts.**
2. Scroll through the contact list. Check that each person is listed, and verify the contents of the fields for accuracy.



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