



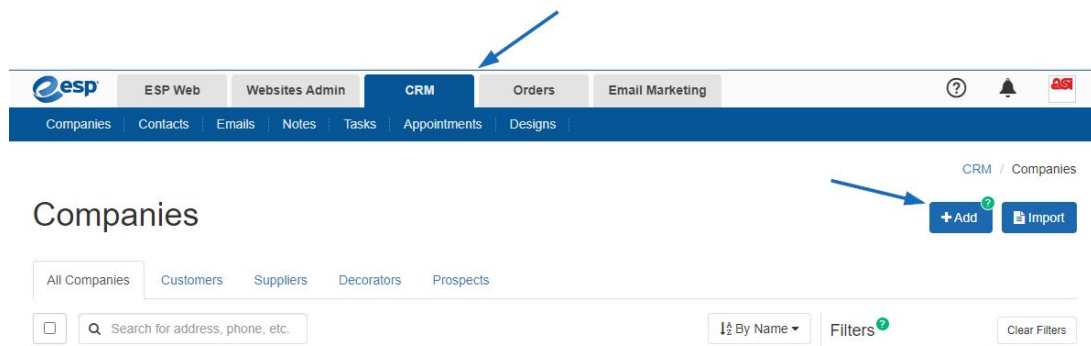
Preparing Your Data for Import into CRM

Wendy D - 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.

The screenshot shows an Excel spreadsheet with the following data:

	A	B	C	D	E	F	G	H	I	J	K	L
1	Company Name	Type	Phone	Email	Website	Address Name	Address Street	City	State	Zip	County	Country
2	ABC Company	Customer	555-555-5555	sales@abcco.com	www.abccompany.com	Main Location	4800 Street Road	Trevose	PA	19053	Bucks	USA
3	DEF Company	Customer	555-555-5556	sales@defcompany.com	www.defcompany.com	Main Location	123 Example Street	Example	PA	19053	Bucks	USA
4	GHI Company	Customer	555-555-5557	sales@ghicompany.com	www.ghicompany.com	Main Location	456 Example Street	Example	PA	19053	Bucks	USA
5												

Separate the First and Last Names of Contacts

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

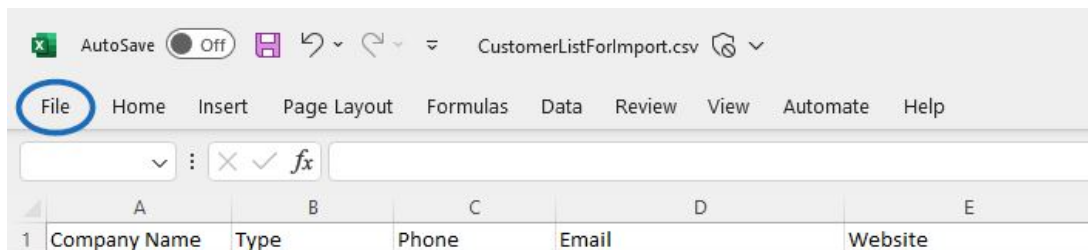


Contact First Name	Contact Last Name	Contact email
John	Doe	jdoe@abc.com
Thomas	Smith	tsmith@def.com
Anna	Williams	awilliams@ghi.com

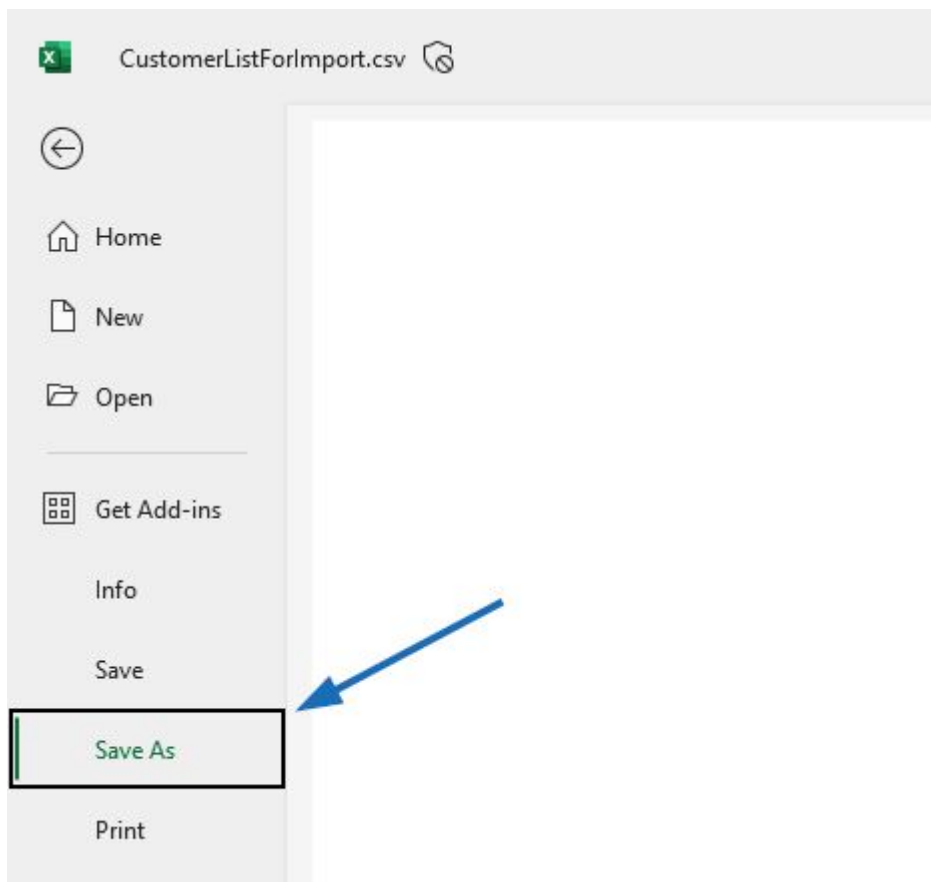
If the data contains full names within a single column, you will need to [separate the name into two columns](#).

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)".

