



IMPORTING YOUR ORGANIZATION'S ACCOUNTS AND CONTACTS

Summary

Import up to 50,000 of your organization's existing contacts and business accounts from common contact manager applications. This wizard is available to administrators and users with the "Modify All Data" permission .

Business Accounts Only

- You can only import business accounts with this wizard. For information on importing person accounts, see the Salesforce online help.

Importing Your Organization's Accounts and Contacts

With the Data Import Wizard, you can import your users' business accounts and contacts from Outlook®, ACT!®, or any program that can save data in the CSV (comma-separated values) format, such as Excel® or GoldMine®.

Preparing the Import File

To get started, prepare your organization's business account and contact data so it's in the proper format for importing to Salesforce.

1. Compare the account and contact data to existing Salesforce account and contact fields to make sure there are places to import the information.

If necessary, create custom fields or picklist values for data that can't be mapped to existing Salesforce fields. For example, if some of your users' contact information includes sales region data, create a Salesforce custom field called `Sales Region`.

2. Export each user's account and contact information to a CSV file. See the Salesforce online help for tips on creating export files from ACT!, Outlook, GoldMine, and other data sources.
3. Using a spreadsheet program like Excel, merge each export file into a single CSV file. This is your import file.
4. Verify that the data in the import file is in the correct format.
 - Sort the data by account name and make sure that all company names are spelled accurately and consistently. For example, *HP* and *Hewlett Packard* create separate accounts.
 - Ensure that there is only one phone number per field.
 - Make sure that contact names and titles are in separate fields.
 - Make sure the file only contains values in one language.
 - Label each column in the file with a name that corresponds to the standard or custom Salesforce field where you want to import the column's data. This simplifies the data mapping step that you perform when running the import wizard.

This table shows some examples of contact field mappings. The Salesforce online help also provides some mapping examples.

Label for Your Import File	Salesforce Field
Contact Description	Contact: Description
Contact Note	Creates a note attached to the contact
Lead Source	Contact: Lead Source

5. Add a `Record Owner` column to the import file and specify the owner of each account and contact. Enter the owner's Username or Full Name; for example: `jsmith@acme.com` or `Joe Smith`.

 **Note:** You can't change the owners of existing records with the import wizard.

If you configure the import wizard to use record IDs for matching, this column is ignored.

Running the Data Import Wizard

To run the Data Import Wizard for Accounts/Contacts:

1. From Setup, enter `Data Import Wizard` in the `Quick Find` box, then select **Data Import Wizard**.
2. Click **Launch Wizard!**
3. Follow the instructions on the wizard screens.

The import process involves these steps:

- Upload the CSV import file into the import wizard.
- Define the matching criteria that the wizard uses to avoid importing duplicate accounts or contacts.
- Map the columns in the import file to the desired Salesforce fields.

When you finish the wizard, the import file is placed in a queue for processing. Import files are processed in the order in which they are received. You receive an email when the import completes.

 **Note:** You can't import accounts or contacts that belong to Read Only or deactivated Salesforce users. Read Only users can't own any type of record.

Importing Notes and Picklists

If the import file contains data that doesn't map to your Salesforce fields, you can include it in notes on either contact or account records.

- Each note is allowed a maximum of 4,000 characters.
- Notes can't contain embedded quotes; for example: this is a note with "embedded" quotes.
- The note's title is determined by the column header in the import file. The data in the column is added to the body of the note.

If the import file includes picklist values, you can import them into existing Salesforce picklists that accurately represent the data. When importing picklists:

- You can import any value into a picklist, even if the value isn't predefined. You can edit the picklist later to include the new values.
- In the import file, separate multi-select picklist values with semicolons.
- You can import a maximum of 100 new picklist or multi-select picklist values for any field during a single import.

Preventing Duplicate Accounts and Contacts

To minimize the chance of importing duplicate accounts and contacts to Salesforce, the Data Import Wizard looks for data in the import file that matches existing Salesforce records.

Testing Your Import File


Before importing all of your organization's account and contact data, we recommend that you try a small, test import first. Create a copy of your import file that contains five records and use the import wizard to verify that the test data is imported correctly.

When you run the Data Import Wizard, you can choose to identify matching accounts and contacts by name, email address, or Salesforce record ID.

- When matching contacts by name, the import wizard compares the import data to the `Account Name`, `Account Site`, `First Name`, and `Last Name` (or `Full Name`) fields.
- When matching accounts by name, the Data Import Wizard compares the import data to the `Account Name` and `Account Site` fields.
- When matching by record ID, note that IDs are case-sensitive.

The Data Import Wizard uses these rules when looking for matches:

- Case is ignored. *Forbes* is the same as *FORBES*.
- Punctuation is ignored. *IBM* is the same as *I.B.M.*
- Abbreviations aren't treated as duplicates. *HP* and *Hewlett Packard* are imported as two different accounts.
- These words are ignored in account names when surrounded by spaces or punctuation, or when they appear at the beginning or end of a name.
 - *Co, Company, Corp, Corporation, Inc, Incorporated, International, Intl, Limited, LLC, Ltd, PLC, The*For example, *Limited, The* matches *The Limited*, but not *TheLimited*.
.com is not ignored, so if you have entries for *Forbes* and *Forbes.com*, two accounts are created.
- Duplicate information in the import file is merged into the same Salesforce record.

 **Note:** In a Private or Public Read Only sharing model, duplicate accounts and contacts are created for each owner unless the owner specified in the import file has read/write access to the existing matching record.

Updating Existing Salesforce Accounts and Contacts

- If the Data Import Wizard finds a name in the import file that matches an existing Salesforce contact record, the wizard updates the record with the import data.
- The import wizard never overwrites your existing account data unless you select the `Overwrite existing account values` checkbox. If selected, the wizard updates existing account values with newly imported values but doesn't update existing field data with blank values. If you don't select this option, the wizard updates empty account fields but leaves fields with existing data alone.