Summary

Import up to 500 of your personal contacts and associated business accounts from common contact manager applications. This wizard is available to all users.

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

If you're an administrator and you want to import business accounts and contacts for multiple users, see *Importing Your Organization's Accounts and Contacts*.

To learn how to use the Salesforce1 app to import contacts from mobile device contact lists into Salesforce, see Import Contacts from Mobile Device Contacts Lists into Salesforce.

Preparing the Import File

To get started, prepare your contact and business account 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, ask your administrator to create custom fields or picklist values for data that can't be mapped to existing Salesforce fields. For example, if some of your contact information includes sales region data, create a Salesforce custom field called `Sales Region`.

2. Export your existing account and contact information to a CSV file. You use this CSV file as your import file. See the Salesforce online help for tips on creating export files from ACT!, Outlook, GoldMine, and other data sources.

3. 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`

Last updated: July 12, 2016

Running the Data Import Wizard

To run the Import Wizard for My Contacts:

1. From your personal settings, enter `Import My` in the `Quick Find` box, then select **Import My Accounts & Contacts**.

2. Click **Launch Wizard!**

3. Follow the instructions on the wizard screens.

   The import process involves these steps:

   - Specify the source of the import file (for example, Outlook, ACT!, or a different data source).
   - 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 processed immediately.

> **Note:** You can only import into fields that you can access via your page layout and field-level security settings.

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. Your administrator 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.

You can identify matching accounts and contacts by name or email address.

- 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.

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.

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.
- If you do not have read and write access to matching records in Salesforce, the import wizard creates new records instead of updating the existing records.