

# GSD. Outlook - How to Import Contacts from an Excel file to Microsoft Outlook

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'https://fmcnadev.service-now.com/api/now/table/sys\_user/acaf843397d74958f7e3bb8fe153afe3',

'value': 'acaf843397d74958f7e3bb8fe153afe3'}

**Category:** {'link':

'https://fmcnadev.service-now.com/api/now/table/kb\_category/56f11880c38a1a100acd330015013196',

'value': '56f11880c38a1a100acd330015013196'}

General Information:

Possible symptoms/errors:

Users want to know How to Create and Use an Email template in Outlook

Alternative names of the system:

Outlook 2016

**IMPORTANT NOTICE:**

N/A

Solution: 1. Ask user to save their Excel workbook as a .csv file.

Note: Before that, below are some standard CSV formatting rules:

Table data is represented using only plain text. The first line may or may not represent the table header. Rows are separated by line breaks (newline characters). Columns (fields) are separated by commas. All lines contain the same number of values.

Outlook can import comma separated value (.csv) files, but not workbooks with multiple sheets, so first step is saving user Excel workbook as a .csv file.

Advise user to open the worksheet with the contact information you want to import to Outlook. Ask user to click File then select Save As. Inform user to choose the location where to save their file. Ask him to click on Browse. In the Save as type box, advise user to choose CSV (Comma delimited) (\*.csv), and ask them to click Save. Excel tells "Some features in your workbook might be lost if you save it as CSV (Comma delimited)." This refers only to limitations of the CSV file and can be ignored. Ask user to click on Yes to keep this format. Inform user to close the CSV file.

2. Ask user to import your contacts to Outlook

User have to click on File. Ask user to select Open & Export > Import/ Export. In the Import and Export Wizard dialog box, inform user to select Import from another program or file and then click Next. Ask user to select Comma Separated Values and click Next. Advise user to click on Browse to find the .csv file they want to import. Under Options, inform user to choose from the following:

Replace duplicates with items imported - If a contact is already in Outlook and your contacts file, Outlook discards the info it has for that contact and uses the info from user contacts file. User should choose this option if the contact info in their contacts file is more complete or more current than the

contact info in Outlook.Allow duplicates to be created - If a contact is in Outlook and user contacts file, Outlook creates duplicate contacts, one with the original Outlook info and one with the info imported from their contacts file. User can combine info for those people later to eliminate duplicate contacts. This is the default option.Do not import duplicate items - If a contact is in Outlook and user contacts file, Outlook keeps the info it has for that contact and discards the info from their contacts file. User should choose this option if the contact info in Outlook is more complete or more current than the info in their contacts file.

Advise user to click Next.In the select a destination folder box, ask user to scroll to the top if needed and select the Contacts folder > Next.Inform user to make sure the check box next to import "NameofyourFile.csv" is selected.Inform user to not click on Finish yet as user may need to associate some of the columns in their CSV file to the contact field in Outlook. Mapping can help the imported contacts turn out just the way they want. Proceed with the next steps.

### 3. Map user CSV file columns to Outlook contact fields.

These steps help make sure that the details from user imported contacts appear in the corresponding field in Outlook.

In the Import a File box, ask user to click on Map Custom Fields. The Map Custom Fields dialog box appears.

Under From, you will see a box with the column names from the CSV file user are importing.Under To, user will see the standard fields that Outlook uses for contacts. If a field matches a column in the CSV file, they will see your column under Mapped from.

User may need to do some manual mapping. For example, in their CSV file, the contacts phone is in the column Phone number. Outlook has multiple field for phone numbers such as Business, Home, etc. When user find the correct option, for example, Business Phone, just select Phone number under From then drag and drop it to Business Phone in the To: pane.Now user can see the Phone number column header next to the Business Phone field.Ask user to drag the other items from the left pane to the suitable Outlook fields. Once done, click OK.Advise user to click Finish. Outlook begins importing their contacts immediately.To view user contacts in Outlook, at the bottom of the navigation bar, ask user to choose the People icon.

Assignment Group:

3rd Party e-mail address: One365Support@freseniusmedicalcare.com

Ticket Creation:

Template: N/ACategorization: N/A

Configuration Item: N/ACategory: N/ASubcategory: N/A

Important Links:

N/A