

Import contact to Odoo CRM

In Odoo CRM, you can import a database of potential customers, for instance for a cold emailing or cold calling campaign, through a CSV file. You may be wondering if the best option is to import your contacts as leads or opportunities. It depends on your business specificities and workflow:

- Some companies may decide to not use leads, but instead to keep all information directly in an opportunity. For some companies, leads are merely an extra step in the sales process. You could call this extended (start from lead) versus simplified (start from opportunity) customer relationship management.
- Odoo perfectly allows for either one of these approaches to be chosen. If your company handles its sales from a pre qualification step, feel free to activate first the lead stage as described below in order to import your database as leads

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Activate the lead stage

By default, the lead stage is not activated in Odoo CRM. If you want to import your contacts as leads rather than opportunities, go to **Configuration** > **Settings**, select the option “use leads if...” as shown below and click on **APPLY**.

CRM

Leads Email Alias

[Setup your domain alias](#)

Leads

- ☐ Each mail sent to the alias creates a new opportunity
- ☒ Use leads if you need a qualification step before creating an opportunity or a customer

This activation will create a new submenu “**Leads**” under **Sales** from which you will be able to import your contacts from the **IMPORT** button (if you want to create a lead manually, [click here](#))

Leads											
Search...											
1-9 / 9											
CREATE IMPORT											
<input type="checkbox"/>	Creation Date	Lead	Contact Name	Country	Email	Phone	Score	Stage	Assigned Partner	Sales Team	Salesperson
<input type="checkbox"/>	08/21/2015 10:42:18	Specifications and price of your phones	Steve Martinez	United Kingdom			0.00	New	Demo Portal User	Indirect Sales	
<input type="checkbox"/>	08/21/2015 10:38:33	Information about laptop	Jose Garcia	Spain	jga@solar.example.com		0.00	New			
<input type="checkbox"/>	08/21/2015 10:38:33	Need Info about your Services	Tina Pinero	Italy	tina@opensides.example.com		0.00	New			
<input type="checkbox"/>	08/21/2015 10:38:33	Need a Quotation for Computers with Accessories	Carrie Helle	United States	helle@stonageit.example.com	+1 813 494 5005	0.00	New			
<input type="checkbox"/>	08/21/2015 10:38:33	Need a New Website	Henry Campbell	United Kingdom	hmc@yahoo.example.com		0.00	New			

Import your CSV file

On the new submenu **Sales** > *leads*, click on **IMPORT** and select your Excel file to import from the “*Choose File*” button. Make sure its extension is **.csv** and don't forget to set up the correct File format options (“*Encoding*” and “*Separator*”) to match your local settings and display your columns properly.

NOTE : If your prospects database is provided in another format than CSV, you can easily convert it to the CSV format using Microsoft Excel, OpenOffice / LibreOffice Calc, Google Docs, etc.

Select rows to import

Odoo will automatically map the column headers from your CSV file to the corresponding fields if you tick *The first row of the file contains the label of the column* option. This makes imports easier especially when the file has many columns. Of course, you can remap the column headers to describe the property you are importing data into (First Name, Last Name, Email, etc.).

opportunity			country
Opportunity x ▾	Notes x ▲ Next Activity Next Activity / Database ID Next Activity / External ID Next Activity 1 Next Activity 2 Next Activity 3 Notes	City x ▾	Country x ▾
Tc Lawson Marketing Limited			Hong Kong
Premier Management Services			Hong Kong
Intermarket Agencies (Far East) Ltd		Kowloon	Hong Kong
Grand Union Trading Co Ltd		Kowloon	Hong Kong
Grace Sun Trading Ltd	Rm 3, 39fl Cable Tv Tower 9 Hoi Shing Rd	New Territories	Hong Kong

TIP: If you want to import your contacts as opportunities rather than leads, make sure to add the *Type* column to your csv. This column is used to indicate whether your import will be flagged as a Lead (type = Lead) or as an opportunity (type = Opportunity).

Click the **VALIDATE** button if you want to let Odoo verify that everything seems okay before importing. Otherwise, you can directly click the Import button: the same validations will be done.

NOTE: For additional technical information on how to import contacts into Odoo CRM, read the *Frequently Asked Questions* section located below the Import tool on the same window.

Related topics

- How to create a contact into Odoo CRM?
- How to create leads from incoming emails ?
- How to generate leads from Odoo website ?

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Reviewer:

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