# 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

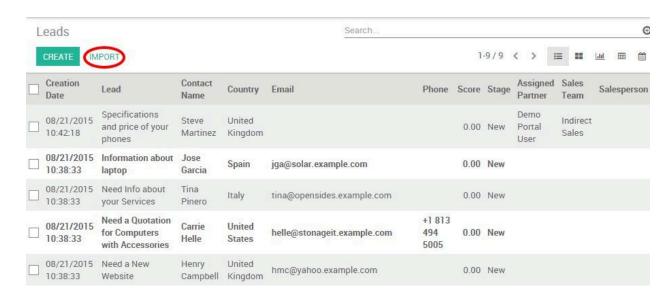
Activate the lead stage Import your CSV file Select rows to import Related topics

### 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.



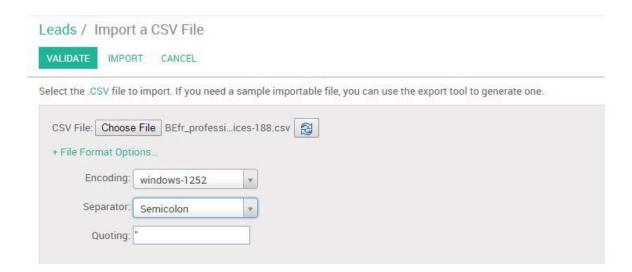
This activation will create a new submenu "**Leads**" under Sales from which you will be able to import your contacts from the IMPORT button (if you want to create a lead manually, <u>click here</u>)



#### Import your CSV file

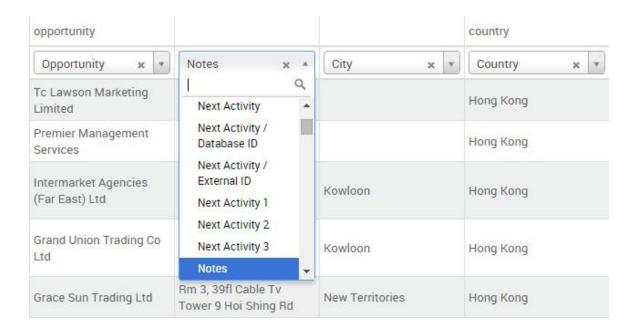
On the new submenu Sales > leads, click on MPORT and select your Excel file to import from the "Choose File" button. Make sure its extension is .csv and don't forget to set up the correct File format options ("Encoding" and "Separator") to match your local settings and display your columns properly.

**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.).



**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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