

How to import your WIB directory details into Microsoft Outlook

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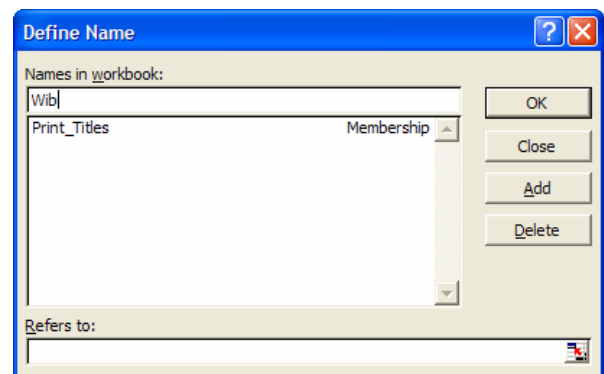
Concept

Rather than re-typing all the new members details into your Outlook Contacts folder, why not just import them straight into Outlook. With a little know-how it's really easy, just follow these steps.

How to do it

Part 1 – get the Excel file ready

- 1) Open the WIB excel file that was sent to you and make sure it is saved into a location on your PC (ie, not just hanging around in the email that you haven't yet moved out of your inbox!)
- 2) You need to name the range of cells that contain the data, so to do this:-
 - a) Click into A1 and select all the cells down to T43
 - b) Click **Insert** menu, choose **Name, Define**
 - c) Type a name for the range (**WIB** for example)
 - d) Click **ADD**
 - e) Click **OK**
- 3) Save the file and close it, and make sure you know where you have saved it!



Part 2 – get an import location ready in Outlook

Complete steps 1 to 2 if you want to keep your WIB contacts separate. If you want to import them straight into your main Contacts folder, click on it and then start from step 4 below.

- 1) In Outlook, click on your Contacts folder (you will need the folder list showing on the left)
- 2) Click **File** menu, **New, Folder** give it a name such as WIB

Part 3 – Start the import to Outlook

- 1) Now click onto the WIB folder you have created (it appears underneath your main Contacts folder and is empty as yet) and will turn blue (highlighted because you've clicked on it). You could also choose to import to your main Contacts folder instead.
- 2) Click **File** menu, **Import/Export**
- 3) Choose **"Import from another program", NEXT**
- 4) Choose **Microsoft Excel, NEXT**
- 5) Choose the file location of the Excel file you named in 2)c) part 1 above. Also in this window choose **"Do not import duplicate items"** tick box. Click **NEXT**.
- 6) Select the WIB folder you created in step 2 part2 above, or your main Contacts folder as you chose and click **NEXT**

Mapping The Fields

This is part of the same sequence but because it is import to get this step right it's best to treat it as a separate topic.

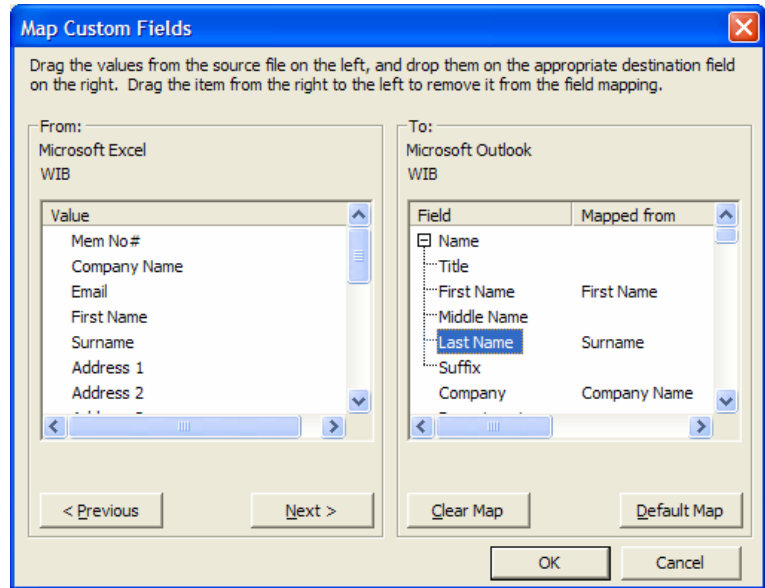
The next screen will be entitled "Import WIB into Folder WIB" (or other name of file and Contacts as appropriate).

7) Make sure the box is ticked and choose **Map Custom Fields**

The next screen display shows you the field names (names at the top of the columns) it finds in the Excel file and the fields it knows about already in Outlook, you now have to tell it how to match the two and this is very easy too. Read on.....

8) The left hand window is the Excel fields and the right hand window is the Outlook fields. You must now click and drag the fields you want from the left hand side and drop them onto the corresponding field name on the right hand side.

- a) For example, click and drag **Company Name** from the left hand side and drop it onto **Company** on the right hand side.
- b) Repeat with all the fields that you want to use in Outlook. **V.IMP Note:** some of the fields on the right have a cross next to them, this shows that some fields are hidden beneath; to open out and view those fields in the Outlook map you need to click on the cross. This is particularly important for the business address and email address sections.
- c) These are the field names that I used in the mapping.



WIB Directory field	Outlook field	WIB Directory field	Outlook field
First Name	FIRST NAME	Web Page	WEB PAGE
Last name	LAST NAME	Business Description	NOTES
Company Name	COMPANY		
Address 1, 2 and 3	BUSINESS STREET 1, 2 and 3		
Town	BUSINESS CITY		
County	BUSINESS STATE		
Post Code	BUSINESS POSTAL CODE		
Fax	BUSINESS FAX		
Telephone	BUSINESS PHONE		
Mobile	MOBILE PHONE		
Email	EMAIL ADDRESS		

9) Once you've configured the map,(and this is just a suggestion you don't have to map everything – just the ones you want to use), click **OK**, then **Finish** and off it goes and imports your contacts ready for you to use.

There are various enhancements to this process, but once you get the hang of this routine you should be able to adapt it to all sorts of data files. Happy contacting...

If you enjoyed learning this technique, this is an example of the sort of thing that we teach business people to do during our tailored courses. The techniques we teach always have an immediate practical benefit and will save you time once you've learned them. Please keep us in mind when you are talking to your own contacts and we would be delighted to hear any feedback.