



Uploading an Excel file of Contacts

In this document, you will learn how to:

- Create a new Outlook Contacts Folder
- Ensure that the New Folder is Available as an Address Book
- Upload the Excel file using the Import and Export Wizard

Create a new Outlook Contacts Folder

Discussion

It is possible to upload the contacts from an Excel file to your normal **Contacts** folder. It is probably better to have subfolders in your Contacts, just as you would in your Inbox. This makes it easier to locate the contacts later.

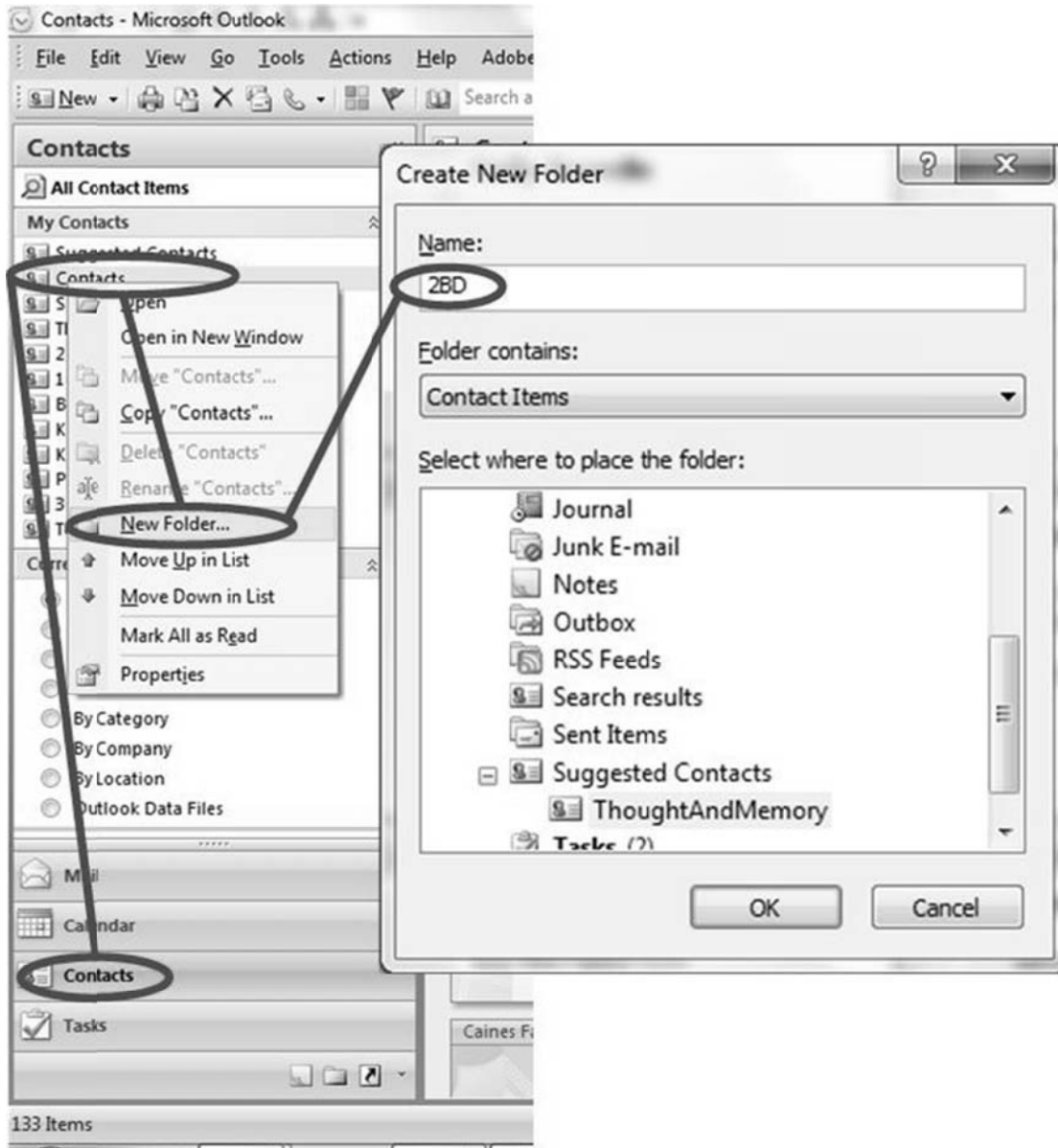


Figure 1: Creating a New Folder in the Contacts

Let's Do It

1. Open Outlook
2. Go to the **Contacts** area
3. **Right click** on one of your existing Contacts folders and select **New Folder** to create a new folder.
4. Type a **name** for the folder (eg 2BD) and click on the **OK** button. The new folder should appear in the **My Contacts** area at the top left of the screen.

Ensure that the New Folder is Available as an Address Book

Discussion

Not all Contacts folders are necessarily used as Address Books. Since we want our new Contacts to be available we will need to check in the **Properties** of the folder.

The easiest way to access the properties is to right-click on the new folder that has appeared in the top left section of the Outlook screen.

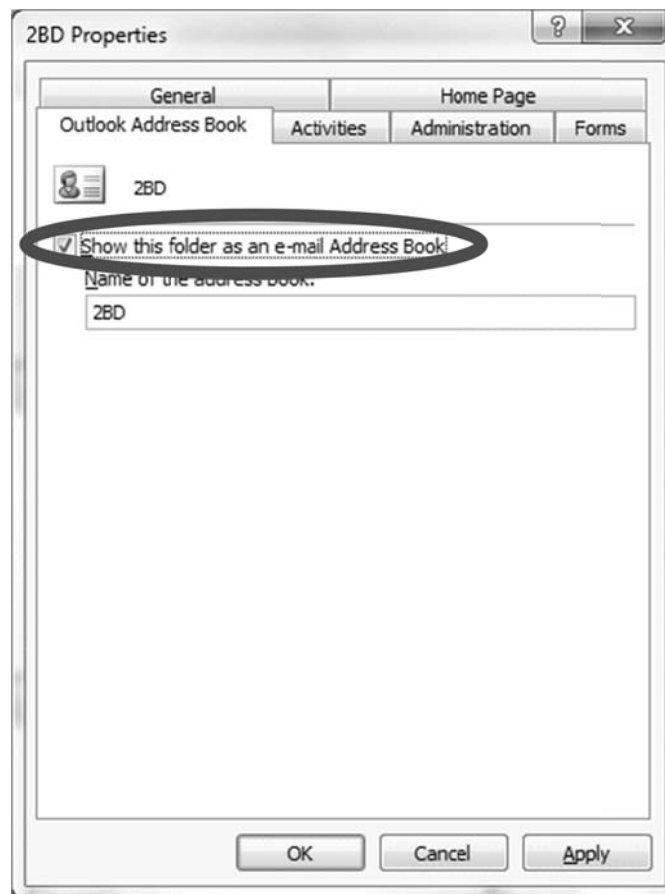


Figure 2: Check the Properties of the Folder

Let's Do It

1. Right click on the new folder.
2. Select **Properties**.
3. Select the **Outlook Address Book** tab.
4. Ensure that the **Show this folder as an e-mail Address Book** option is ticked.
5. Click on the **OK** button to dismiss the dialog box.

Upload the Excel file using the Import and Export Wizard

Discussion



Both Outlook 2007 and 2010 recognise Excel databases in the Excel 97-2003 (xls) format. They do not recognise the later xlsx format.

A Wizard is used to upload the file. The Wizard searches the Excel database for headings that match the fields in the Outlook database and automatically matches them up. If the names of the Excel database don't match those in Outlook you can manually **map** the fields - that is, match them up yourself.



The most commonly used Outlook fields are named *First Name*, *Last Name*, *Notes*, *Home Phone*, *Home Address*, *Mobile* and *E-mail*. If your Excel field have exactly these names then the Wizard will automatically recognise them.

Starting the Wizard is slightly different depending on whether you are using Outlook 2007 or 2010. 2007 uses the **File** menu, then the **Import and Export** command. 2010 uses the **File** tab, the **Open** category, then the **Import** command.



If you get a message saying that you need Administrator rights to install you will need to contact your IT group.

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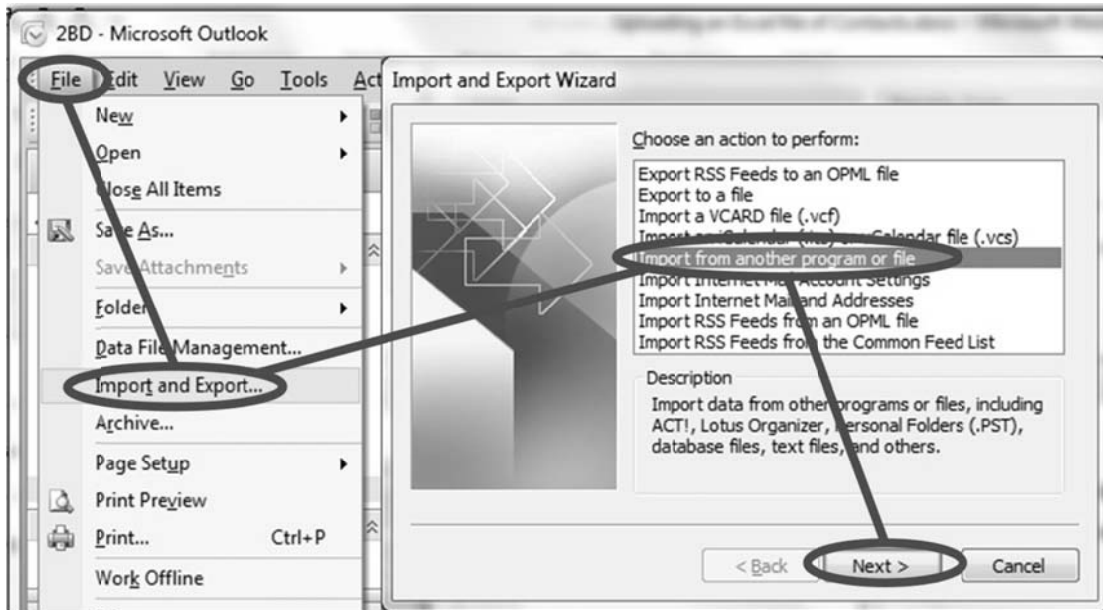


Figure 3: Starting the Wizard in Outlook 2007

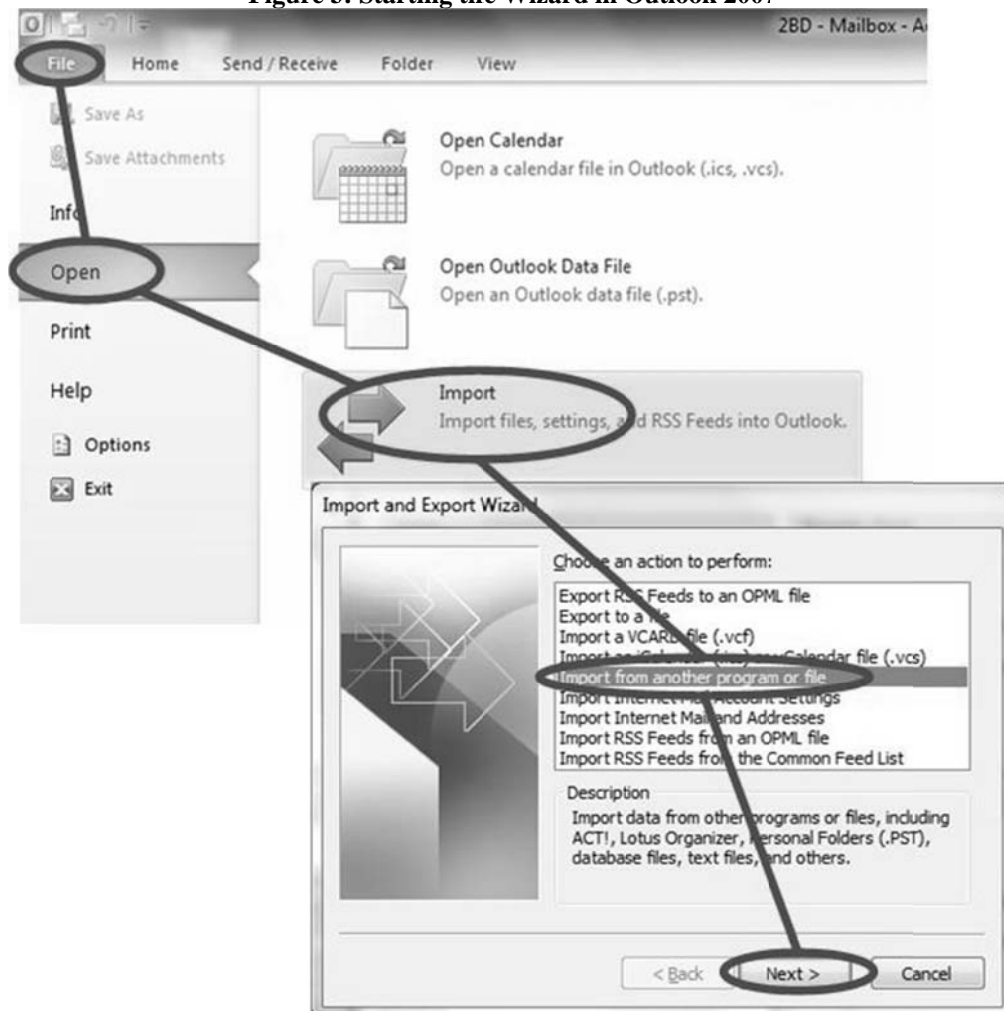


Figure 4: Starting the Wizard in Outlook 2010

Let's Do It

1. Copy the Excel file to a location that you will be able to find.
2. Select **File/Import and Export** (for 2007) or **File/Open/Import** (for 2010) to start the Wizard. If you get a message saying that the Wizard is not installed then select the option to install it.
3. Ensure that the **Import from another program or file** option is selected.
4. Click on the **Next** button.
5. Select the **Microsoft Excel 97-2003** option.
6. Use the **Browse** button and locate the Excel file, then click on the **Next** button.
7. Ensure that the new folder is selected and click on the **Next** button.
8. Click on the **Finish** button.