



CRM Solutions by LeadMaster



LeadMaster CRM File Cleaning

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OVERVIEW

Scrubbing, cleaning, organizing and gathering all your data for importing into the system is an important first step in making the most of what LeadMaster has to offer.

If you don't have the resources to do this there are many companies who offer this service such as winpure.com and helpit.com.

If you're going to do the data scrubbing yourself here are some helpful tips.

FILE CLEANING

Often times, data is copied from one spreadsheet to another with different numbers of columns in each – to the naked eye, the data looks fine, but in fact it creates an import file where there are differing numbers of columns of data in each row. The import routine **must** assume that each row has the same number of columns.

Before importing a file, a few easy "clean up" steps on a file resolve a large majority of import errors:

1. Highlight twenty or so extra columns to the right of the last column you wish to import and delete them. Do the same at the bottom of the file for extra rows.
2. To the right of the last column, add a column (call it EOF) and populate a value (such as EOF) for this field in every record. This addresses problems caused where rows with different numbers of columns have been pasted together in one document.

If you have a large file and are experiencing problems with it, in addition to the above steps, it is often advisable to create a small test file with only a handful of records.

If you can complete the import OK, then the data itself is suspect. If you do encounter an error during that small test, it may be caused by the file not being compatible with the import template (in which case you should try creating a new template) or an issue with the import routine itself.

CONTACT SUPPORT

If after completing the file preparation steps above, you still encounter an error during import, in order for us to troubleshoot your import error, we will need the following:

- Username
- Database and workgroup name
- A copy of the file you are importing
- The name of the import template you used when you received this error (Our team needs this to understand exactly what is being mapped)
 - if you did not save the template, please run through the import wizard again and save the template in the last step
 - Are you choosing to add additional contacts in the 2nd to last screen?
 - If so, what are the key fields you chose?
 - Details with regard to where in the import process you got the error (in the setup, after it started running, if it started how far did it get with the progress bar)