Data Upload

Sage CRM v7.0

The Data Upload facility within CRM, is designed for the upload of data into the following tables:

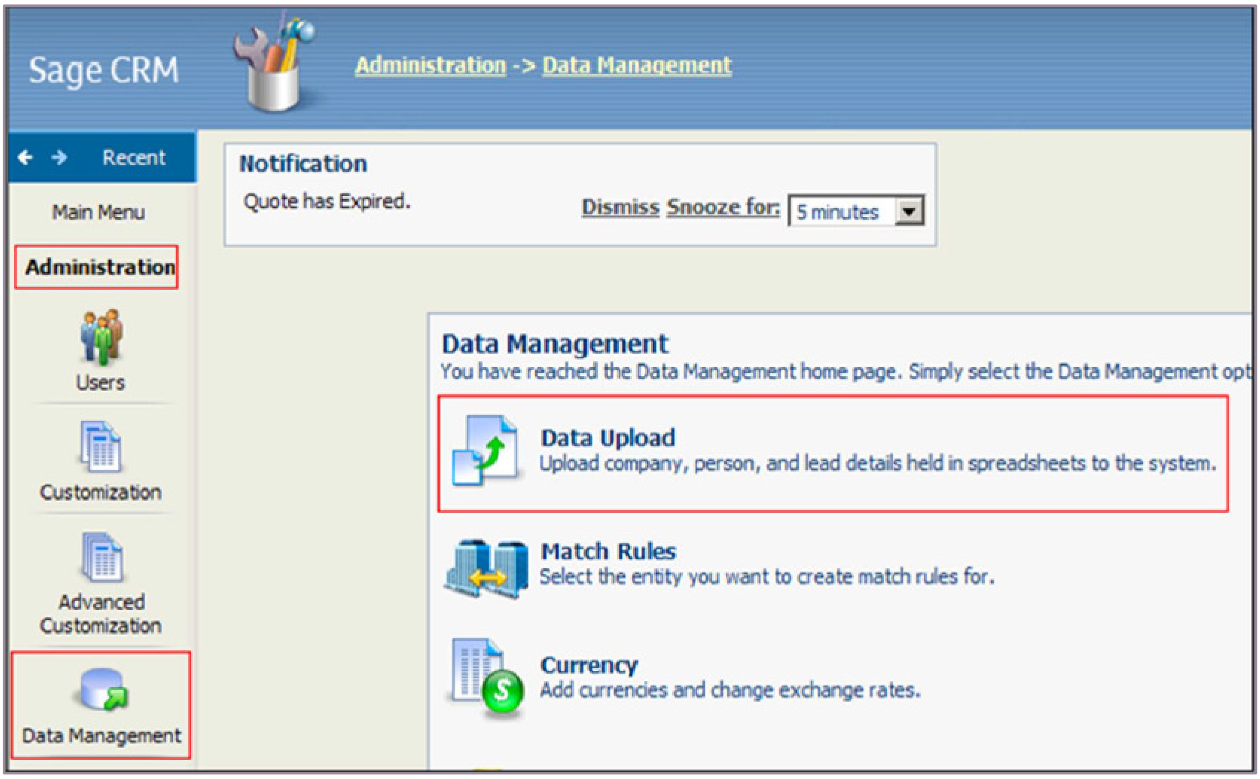
- Company
- Person
- Lead

Note: once data is entered into the database, it cannot be mass deleted through the front end of CRM. If you are uploading a large amount of data, it is advised that this is split into manageable batches, of a size you are happy to delete through CRM should the need arise.

1. Accessing the Data Upload Facility

To access the data upload facility, you must have Admin rights, or be an Info Manager with Data rights.

From the Administration menu, select Data Management, then Data Upload.



Once at the Data Upload menu, select the entity you wish to upload to.

In this example, we will be uploading to the Company entity.

2. Preparing the data for upload

Before you begin the upload, you must ensure that any mandatory fields are included in the upload, or the upload will fail.

Fortunately, the upload will advise of mandatory fields, that are missing from the upload.

The following fields must be mapped to...
Address Address 1
Person Last Name
Person Website

Data File Column	Dedupe Rule	Sample Data	Belongs to	Data Table	Field Name	Actual Field	Type
Company Name		Sage UK	Company		Company Name	Comp_Name (WideString 60)	
First Name		Sage	Person		First Name	Pers_FirstName (WideString 30)	

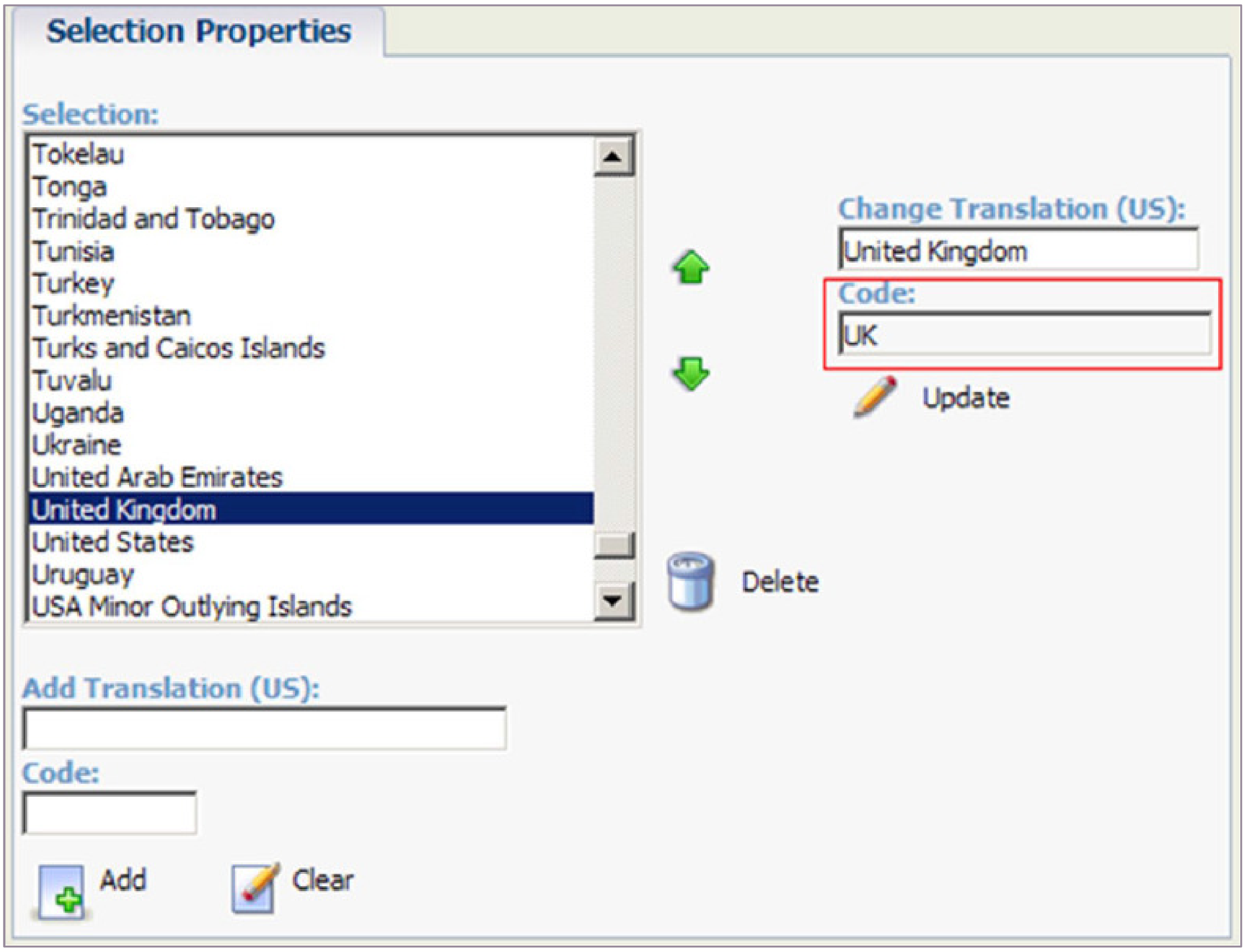
In the example above, the following fields will have to be added to the upload sheet, for the upload to be valid:

- Address line 1 for the company
- Person last name
- And Person website

3. Selection Fields

If you are uploading to a Selection field, you must upload the **code** and not the caption, if you do upload the caption, then any searches made using this data **will not** return results.

For example, if I wish to upload the country for the companies address as ‘United Kingdom’, I will upload the data ‘UK’:



If we look at the address database, you will see that the data held for the country, displays ‘UK’:

	addr_country	Addr_AddressId	Addr_Address1
1	UK	2	Thames Street.

But when displayed in CRM, it is ‘United Kingdom’:

1 Address, Page 1 of 1

Street	City	Zip Code	State	Country
Thames Street.	Reading	RG1 4RR		United Kingdom

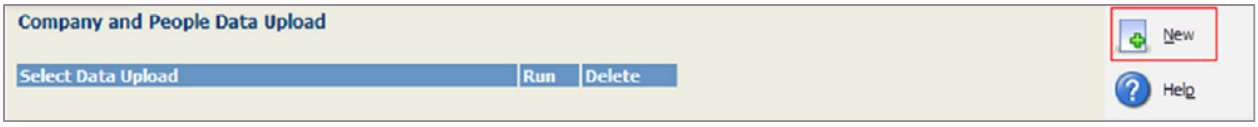
4. File Format

The recommended file format is .csv, but .xls can be used to upload data.
Note: If .xls is used, impersonated user settings MUST be configured. See page 11 for details.

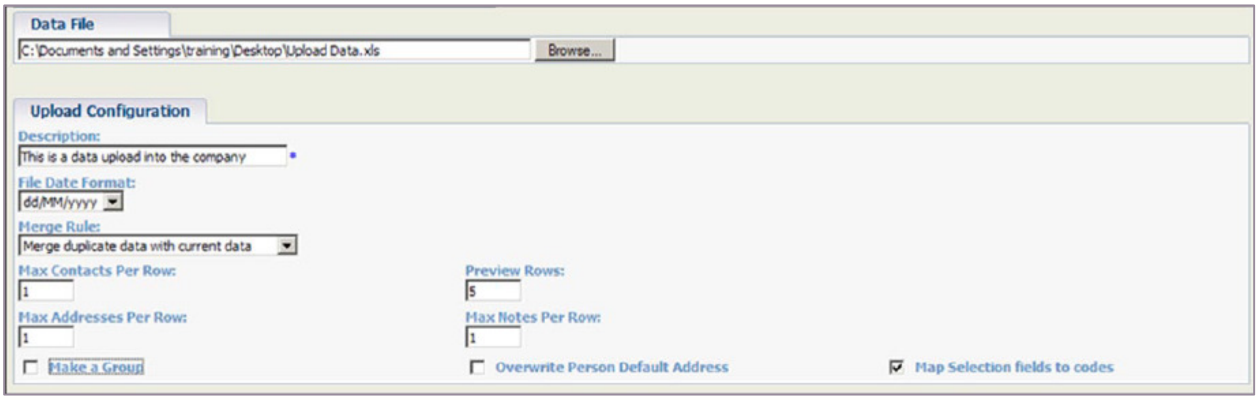
5. The Data Upload

5.1 Step 1 of 4

Once your data is in the correct format for upload, you can create a new data upload, and data match. After you have selected the entity you wish to upload, select New.



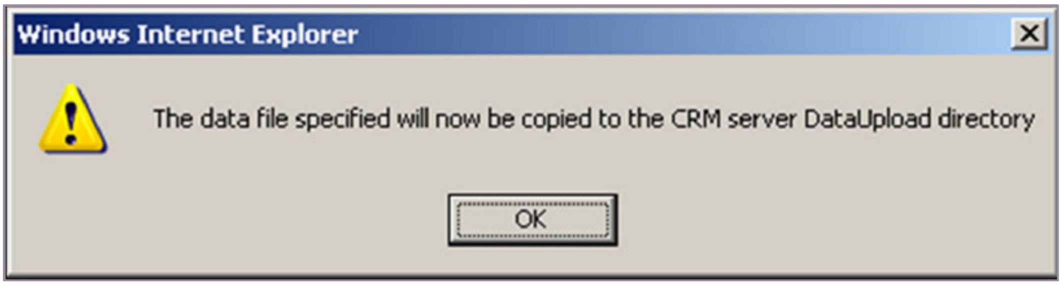
You will then be taken to the data upload screen:



- **Date File:** This is the file that contains the data for upload. Use the Browse function to navigate to the file.
- **Description:** A description of the data upload, so it can be identified in the future.
- **File Date Format**: The format in which you wish the date to be displayed.
- **Merge Rule**: Choose between Merge data or Overwrite data.
- **Max Contacts Per Row**: The number of contacts specified per row of data in the upload sheet.

- **Preview Rows**: The number of rows that will be displayed as a preview, before the upload is completed.
- **Max Addresses Per Row**: The number of address records per row.
- **Max Notes Per Row:** The number of note records per row.
- **Make a Group**: The uploaded records will be loaded into a group.
- **Overwrite Person Default Address**: The default address of the person, will be changed to the uploaded address.
- **Map Selection fields to codes**: Selection fields will be uploaded using Codes.

Select Save once you have specified the details you require in the above fields.
You will be presented with the following message:



This is simply advising that the file will be uploaded to the server, from the local machine.

5.2 Step 2 of 4

In step 2, the data is mapped to the relevant field in the CRM database.

CRM will try and match the data, based on the column headers, but it is advisable to double check these mappings, and ensure you are happy with them.

Data File Column	Dedupe Rule	Sample Data	Belongs to	Data Table	Field Name	Actual Field
Company Name		Datel Computing Limited	Company		Company Name	Comp_Name (WideString 60)
Type		Customer	Company		Type	comp_type (WideString 40)
Website		http://www.datel.info	Company		Website	Comp_Website (WideString 100)
Account Manager		28	Company		Account Manager	comp_primaryuserid (Integer 10)
Last name		Doe	Person		Last Name	Pers_LastName (WideString 40)
First Name		John	Person		First Name	Pers_FirstName (WideString 30)
Address Line 1		Cinnamon Park	Person	Address	Address 1	Addr_Address1 (WideString 40)
City		Warrington	Person	Address	City	Addr_City (WideString 30)
Postcode		WA2 0XP	Person	Address	Zip Code	Addr_PostCode (WideString 10)
Country		UK	Person	Address	Country	Addr_Country (WideString 30)

Fields not mapped yet (will be ignored)	
Note	This is a note, to be uploaded.
County	Cheshire

In this example, the field Note and Country have not been mapped, to map these fields, simply select the hyperlink on the field name:

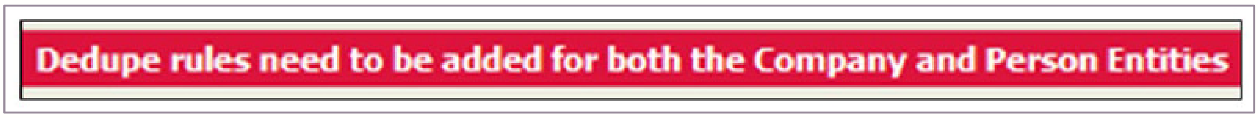
Data File: Note (Column 11)	
Belongs to	Company
Data Table	Notes
Field Name	Notes : Note

The above screenshot displays the mapping that has been specified for the Note field.

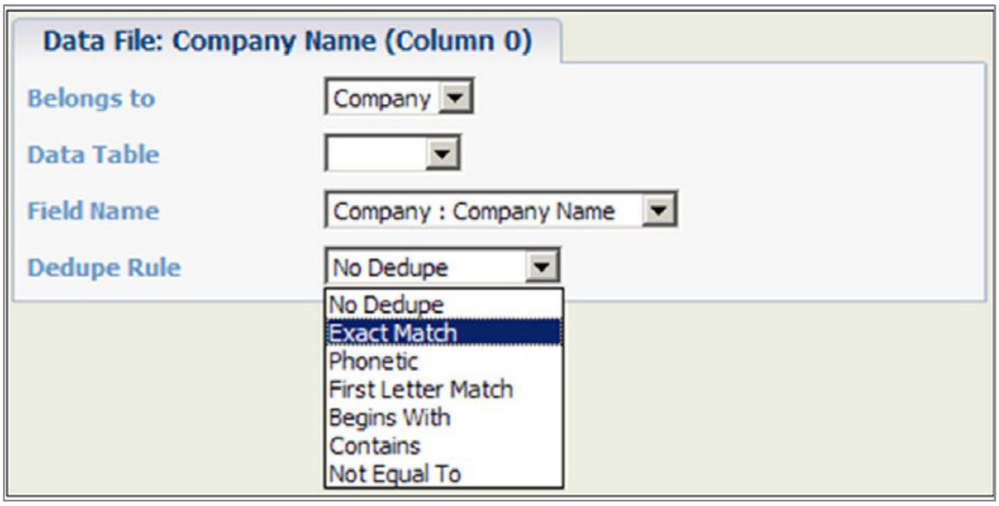
Data File: County (Column 6)	
Belongs to	Company
Data Table	Address
Field Name	Address : State
Company Address Type	Business
Dedupe Rule	No Dedupe

The above screenshot displays the mapping that has been specified for the County field.

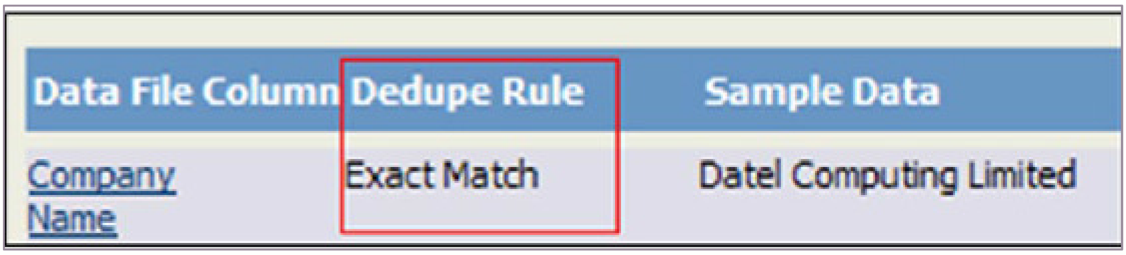
Select Preview Data Upload:



The above error will be displayed, at least one dedupe rule must be specified for the company and person entity. To add a dedupe rule, select the hyperlink for the column you wish to add it to:



Once the dedupe rule is added, it will be displayed in the list:



Once the dedupe rules have been added, select Preview Data Upload.

5.3 Step 3 of 4

Step 3 allows a preview of the data, and also the following options:

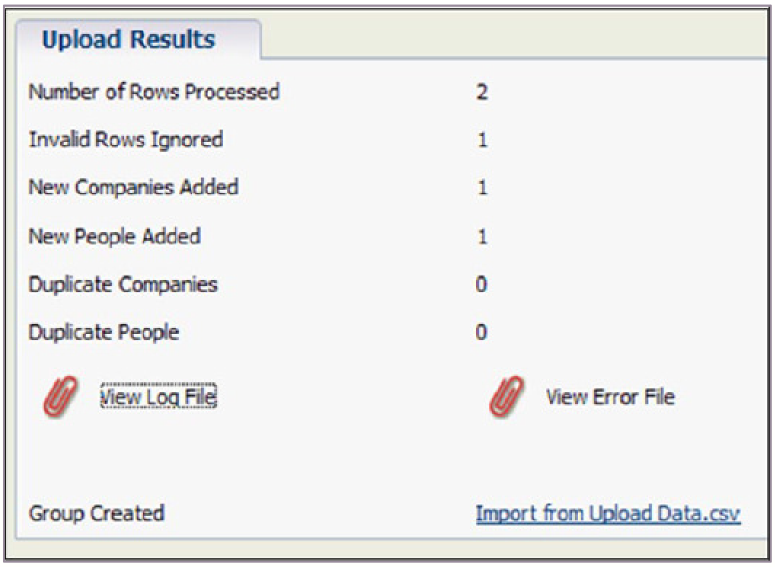
- **Source**: You can add a source to the upload, for searching purposes, if required.
- **Log File**: Choose either Overwrite Log File, or Append To Log File for the upload. Appending to the log file will take more space on the server, as the file will grow in size.

- **Process Duplicates**: Choose either Process Duplicates in Batch, or Process Duplicates Interactively.
- **Batch Size**: If uploading a large amount of data, choose to perform this in batches.
- **(Please see page 9 for Deduplication)**

Once you are happy with the settings, select Do Upload.

5.4 Step 4 of 4

Step 4 is the data upload. CRM will now process the upload, and display a summary.



From the above, you can ascertain how many records have been created in each entity, and how many have failed.

If you choose to view the log file, you can see the error that is reported:

```
Started at: 27/10/2011 11:52:18
Run by   : Admin (System Administrator)

Type    Details                                    Row     Column  Mapped to       Value

Error   InvalidAddressDetails                      3                       Required Field(s) blank

Finished at: 27/10/2011 11:52:23
Number of Rows Processed                : 2
Invalid Rows Ignored                    : 1
New Companies Added                     : 1
New People Added                        : 1
Duplicate Companies                     : 0
Duplicate People                        : 0
Group Created                           : Import from Upload Data.csv
```

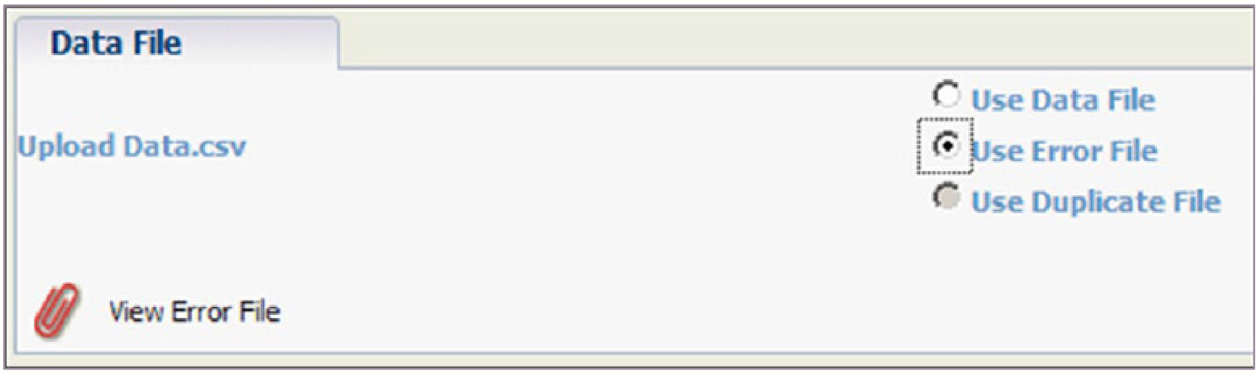
If you choose to view the error file, it will give a .csv file with the problem rows:

A	B	C	D	E	F
Company Name	Type	Website	Account Manager	Address Line 1	City
HP Computers	Supplier	http://www.hp.com	29	HP Head Office	

This is a read only file and can be saved, amended and re-uploaded. If you have access to the server, you can amend the error file directly on there.

This file is held in Program Files > Sage > [CRM Instance Name] > Library > DataUpload.

If the file is amended here, it can then be selected from the upload, and re-uploaded:

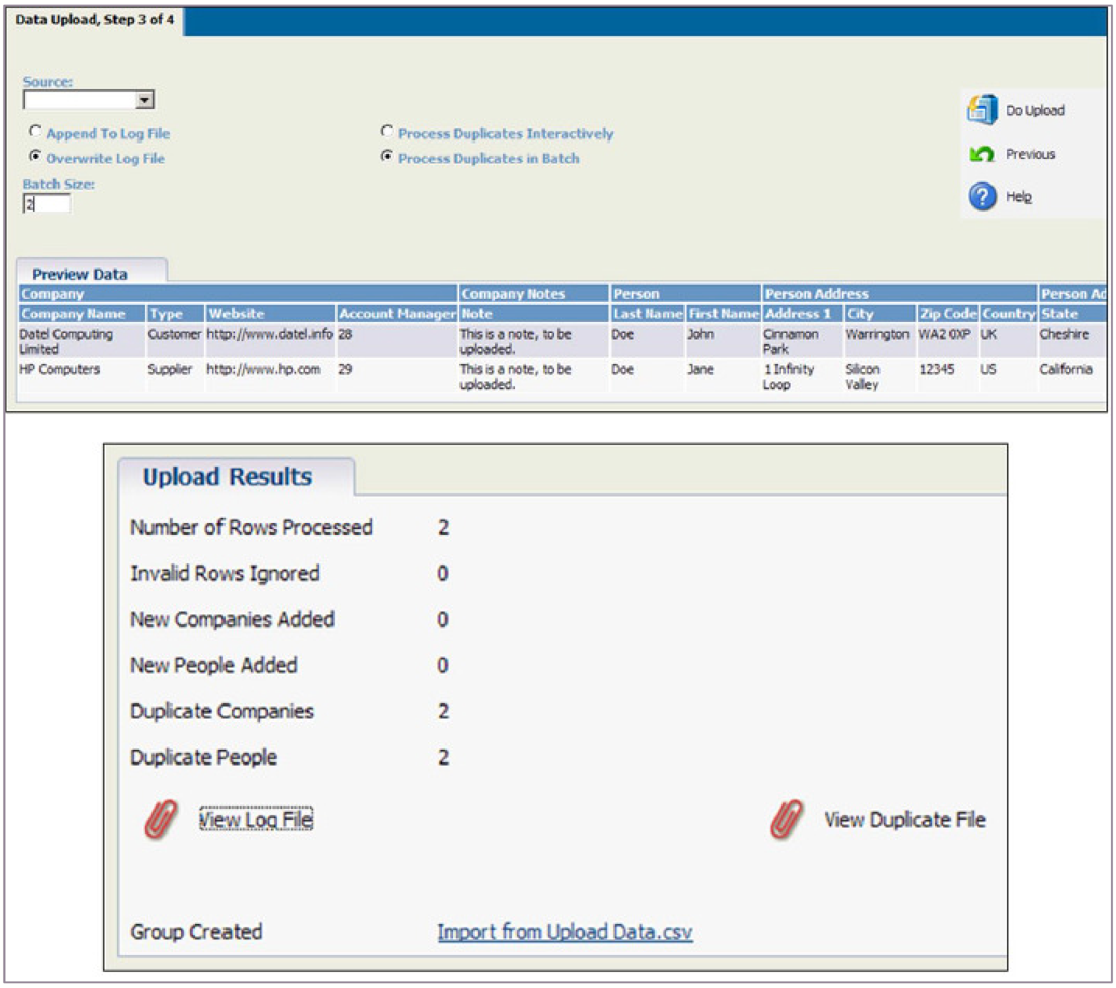


This option is available, when returning to Step 1 of 4, of the data upload.

6. Duplication

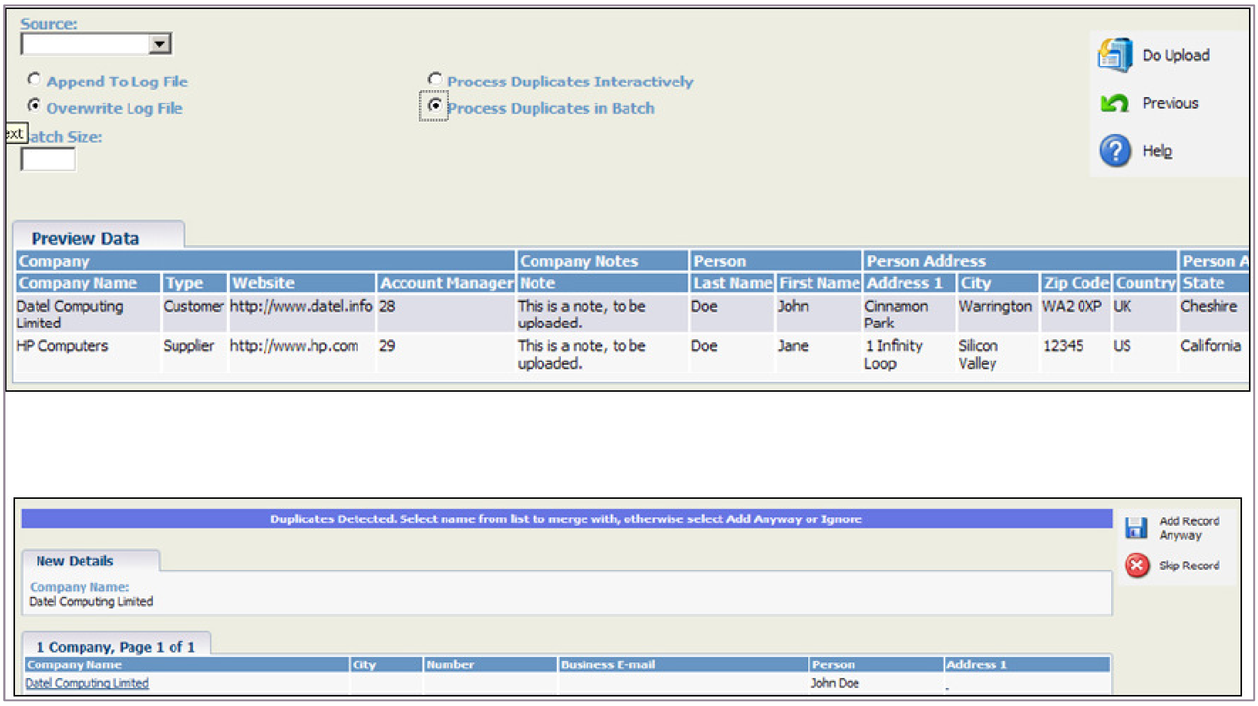
6.1 Process Duplicates in Batch

If processing duplicates in a batch is selected, the system will run the upload, warn of duplicates that have been found and create a duplicate file.



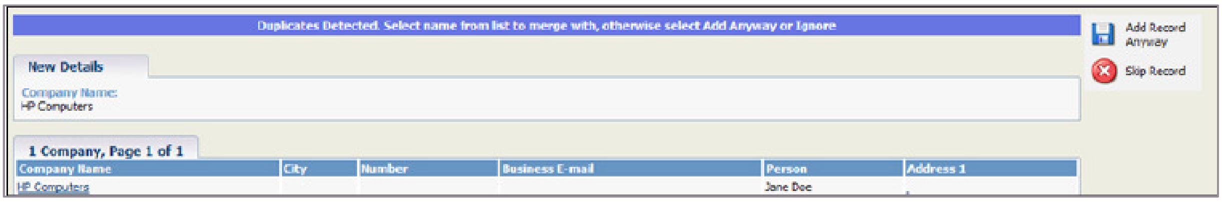
6.2 Processing Duplicates Interactively

Processing the duplicates interactively is a slower process, as each duplicate is displayed to the user and an action to either ignore, insert or merge is taken.



The above screen shot gives the user 3 options:

- Select the hyperlink of the company name to merge the data.
- Add the record.
- Skip the record.

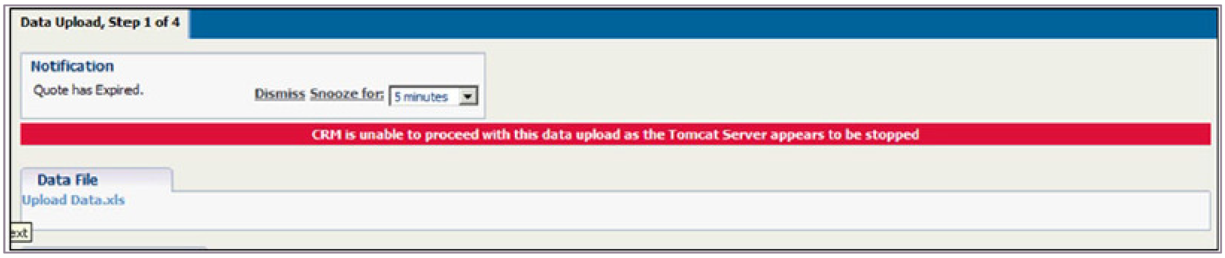


This process will be presented to the user, for each duplicate that is found. This can be time consuming if the upload is large.

7. Trouble Shooting

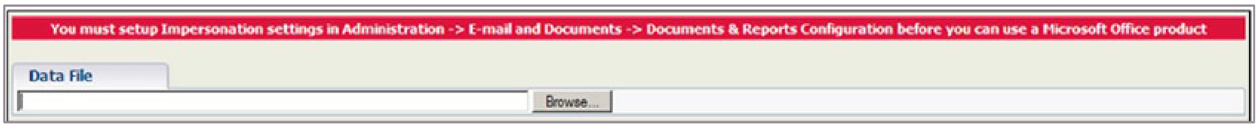
7.1 Tomcat Server appears to be stopped

CRM versions 7 and above, use the Apache Tomcat service to perform the data upload. If the service is not running, or is experiencing an issue, the following message may be displayed when trying to proceed to step 2 of 4:



If this is experienced, ensure that the Apache Tomcat service is started. If it is started, restart the service, log out of CRM, log back into CRM, and try the upload once more.

7.2 Impersonated User



The above error will be displayed if the file type for upload is .xls, and the impersonated user settings for office programs have not been configured.

To configure the 'Impersonated user settings' navigate to:

Administration > Email and Documents > Documents and Reports configuration

Within this configuration screen, you will see the following fields:

Ensure that these are populated with a valid user, domain and password.

8. SQL Code: 3621 UnexpectedEvent

The above error is displayed when the upload file's name, is more than 60 characters in length. This is shown in the SQL log, within CRM:

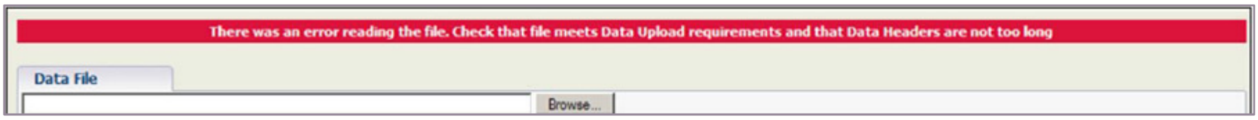
```
INSERT INTO
DataUpload(DaUp_Description,DaUp_DateFormat,DaUp_MergeRule,DaUp_MaxContacts,DaUp_PreviewRows,DaUp_MaxAddresses,DaUp_MaxNotes,DaUp_MakeTargetList,DaUp_AddressDefault,DaUp_DoAutoSelects,DaUp_UploadFileName,DaUp_Type,Daup_MappedFileId,DaUp_TargetListKey,daup_CreatedBy,daup_CreatedDate,daup_UpdatedBy,daup_TimeStamp,daup_UpdatedDate,DaUp_DataUploadId)

VALUES (N'Test',N'dd/mm/yyyy',N'1',1,5,1,1,N'Y',NULL,N'Y',N'Upload Data this is a stupidy large file name and will most probably cause an error as the maximum number of characters allowed is 60.csv',N'Company',0,'20111027 14:46:42',1,'20111027 14:46:42',1,'20111027 14:46:42','20111027 14:46:42',13)

String or binary data would be truncated
```

To avoid this error, ensure that the name of the upload file is a short as possible, whilst still being relevant.

8.1 Error Reading File



The above error is a generic error, and can mean one of the following:

- The file is corrupt - ensure you can open the file without any errors being displayed in the program it is opened with.
- The data headers are too long - ensure that the data headers are not overly long, try and match them to the captions available in CRM.

8.2 Timeout Expiry Message

If you get a Timeout Expiry message when uploading data, set the Lines To Process field to 70. This refreshes the data upload progress chart every 70 lines, and forces CRM to reconnect to the server after processing this number of rows. This is necessary for large files containing more than 70 rows.

8.3 Frozen Screen

If you get a frozen screen without an error, your data file may be too large, and you may not have indicated the number of rows to process. Limit your file to approximately 5000 rows *(Taken from the Sage CRM online help.)*

9. Sage Data Upload Requirements

Below is an extract from the help menu in CRM, and should be adhered to:

9.1 Import File Requirments

The file that you prepare for the data import must meet the following requirements:

- The contact information must consist of at least companies and people. It can also include addresses, phone numbers, e-mail addresses, and notes.

- For a company or lead data upload there must be at least one company and one person on each row of the file. For an individual's data upload there must be at least one person on each row of the file.
- All data for a person must display on one row only. For example, you cannot have a person's phone number on one row and their fax number on the next row.
- Multiple people for the same company may be given on the same row of the file or on different rows. If they are on different rows, the company name must always appear on each row.
- Any fields on Company, Person, E-mail, Address, and Phone tables that are set to be required in CRM must be present in the file. Contact information will not be added to CRM unless it satisfies the validation criteria.
- Any number of Addresses may be included on the same row.
- Any number of Notes may be included on the same row.
- All date fields in the file must be in the same format.
- It is possible to split data from one column into multiple fields in CRM. For example, if there is one column that contains both first name and surname, it can be split up into the correct CRM fields. Fields must all be on the same table. The utility is not capable of Mc and O' surname processing so will not work if the field is "Surname First Name" and there are surnames with spaces in them. Fields specified must be present in all rows of data.
- For example, if you specify "Salutation Surname First name" as the format, if the salutation is not present in any row the surname may be entered into the Salutation field and the First name into the Surname field, resulting in invalid or incorrect data.
- Prepare your file so that it contains company details followed by a number of persons and address details. If you have the same address in a company upload for multiple people, the address will be added once. Any updates made to the address after upload will apply for all people linked to that address.
- Put a header row in your file so that you know what data is contained in the column, so that when that data upload tool points at this row it will show you the header values which will make mapping data easier. You could consider using the actual CRM database column names for your header row as much as possible, for example, pers_lastname, and if you have multiple people in your row put the identifier at the end of the column name—pers lastname1, pers_lastname2. The data upload performs an automatic mapping of fields, which will be more accurate.

- The file name must not exceed 60 characters in length. If it does, an error is displayed.

9.2 CSV Import File Preparation

- If you have received a CSV file for upload that has been prepared by someone else, open it and verify that the data is in standard CSV format. All values must be separated by commas.
- Any values that contain a comma must be enclosed in double quotes.
- Any values that contain double quotes must be escaped with another double quote.

Note: if you save an MS Excel file as a CSV file, it should carry out this formatting automatically.

The below was published by Sage, written to assist with the data upload.

10. Sage CRM On-Demand Team Blog

10.1 Data Upload- Do's & Don'ts

Posted by Sage 31.01.2011
Preparation is key, this is certainly true when it comes to uploading your data to Sage CRM

DO

- Note that you must have Administrator or Info Admin Data privileges in order to perform data uploads.
- Remember that for a company data upload there must be at least one company and one person on **each row** of the file. If your data includes several people from the same company on different rows, **the company name must appear on each row.**
- Note that all data for a person must display on one row only. For example, you cannot have a person's phone number on one row and their fax number on another row.
- Know that if a field is required in CRM, there must be an equivalent column with data in it in the upload file. If you wish to change the required fields you can do this through Field
- Level Security from Administration > Customization > Entity > Fields.

- **Cater for Duplication**: If you want to prevent the same record from being uploaded twice, check your system deduplication settings from Administration | System | System Behavior Set to Yes to make advanced field level dedupe options available during the upload.
- If set to No, **basic dedupe will still be carried out based on exact matching of the Company Name, Person Name and Address1 fields**.
- Put a header row in your file so that you know what data is contained in which column. Youcould consider using the actual CRM database column names for your header row to reduce mapping time during the upload.

DON'T

- Give your file a name longer than 60 characters.
- Try to upload a file where required fields have not been mapped; if you do not have an equivalent column in your upload file for each required field, the upload will fail.