

Step 1: Customize before you upload

Check that all the fields you have data for exist in Sage CRM. If not, add them first.

Example:

You have a Company Credit Hold flag for each company you want to upload.

1. Go to **<My Profile> | Administration | Customization | Primary Entities | Company** and add the field first.
2. Let's say you call this field **comp_credithold**, and it has the options Yes or No.
3. Add it to the **Company Entry Screen**, and test it by adding a new company.
4. Then, make sure the **column heading** in the data upload file where that data appears is headed with **comp_credithold** (see sample upload ①).

Step 2: Check required fields

If a field is required in Sage CRM (has a star next to it when you add data), then it must be included in the data upload file.

Example:

- The first line of the address (**Address 1**) is a mandatory field in Sage CRM. Make sure your data upload file contains this data ②.

Step 3: Check field length

If the data in a column of your data upload file is longer than the field length in Sage CRM, then the full content for that field will not upload. See sample upload ③.

Example:

- The maximum field length of Address 1 is **40 characters**. Use the Address 2, 3, and 4 fields if this is not long enough for your data.

Step 4: Check the file name

Make sure the file name of the data upload file is less than **60** characters.

Step 5: All in a row

Check you have at least one company and one person per row in the data upload file, and that all the person's details appear on the same row.

Example:

- If you have more than one contact person for a company, you can add each contact on a new row, however, the company name **must be repeated** in each row. See sample upload ④.

Step 6: Map fields

You may need to "help" Sage CRM map the fields in your spreadsheet to the correct fields in Sage CRM.

Example:

- In the sample upload, which includes person phone as well as company phone details, the **Company Phone Area Code** and **Company Phone Number** columns require manual mapping during the upload.
- Just click on the hyperlink and map them to, for example, **Company | Phone | Phone : Area | Business** and **Company | Phone | Phone: Phone Number | Business**.

Step 7: Add de-duplication rules

Unless you have de-duplication disabled (which we don't recommend) you must add at least one de-duplication rule to a company and to a person field during the upload.

Example:

- During the data upload preview in Sage CRM, click on the hyperlink of the **Company Name** and set the Dedupe Rule to **Exact Match**. Do the same for **Person Last Name**.

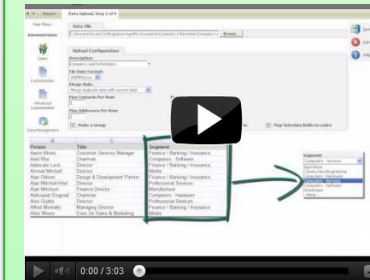
Resource Centre

Video Tutorials

[Preparing for data upload](#) [2:20 mins]



[Performing a data upload](#) [3:05 mins]



Advanced topics

- [Adding a field to a screen](#)
- [Import file requirements](#)
- [Using a CSV file to upload](#)
- [Using an Excel file to upload](#)
- [Data upload fields](#)
- [Mappings and de-duplication rules](#)
- [Previewing data](#)
- [Performing a data upload](#)
- [Hints and troubleshooting](#)

Sage CRM

Sample Upload

| Person Last Name | Person First Name | Salutation | Title | Person Email | Pers Phone Area Code | Pers Phone Number | Comp Name | Company ADD1 | Company ADD2 | Company ADD3 | City | Comp Post Code | Country | comp_creditshold | Comp Phone Area Code | Comp Phone Number |
|------------------|-------------------|------------|--------------|--------------------------|----------------------|-------------------|---------------|-----------------|------------------------|--------------|--------|----------------|----------------|------------------|----------------------|-------------------|
| Johnson | Les | Mr | I.T. Manager | LJohnson@demosaqecrm.com | 0208 | 203 4067 | M K Group Plc | Chiswick Centre | 414 Chiswick High Road | | LONDON | W4 5TF | United Kingdom | Yes | 0208 | 203 4000 |

| Person Last Name | Person First Name | Salutation | Title | Person Email | Pers Phone Area Code | Pers Phone Number | Comp Name |
|------------------|-------------------|------------|--------------------|-----------------------------|----------------------|-------------------|------------------------|
| Johnson | Les | Mr. | I.T. Manager | LJohnson@demosaqecrm.com | 0208 | 203 4067 | M K Group Plc |
| Johnson | Leslie | Mr. | I.T. Manager | LJohnson@demosaqecrm.com | 0494 | 203 2575 | Maqadi |
| Dickson | R | Mr. | Managing Director | RDickson@demosaqecrm.com | 0246 | 170 5037 | Magnox People 5 |
| Joerres | Leslie | | I.T. Manager | LJoerres@demosaqecrm.com | 0135 | 202 9057 | Magnox People |
| Jenkins | Linda | | I.T. Manager | LJenkins@demosaqecrm.com | 0121 | 202 6358 | Management Car PLC |
| Edwards | Peter | Mr. | Managing Director | PEdwards@demosaqecrm.com | 01908 | 175 4555 | Manchester Trucks |
| Jenkins | Lindsay | | I.T. Manager | LJenkins@demosaqecrm.com | 01793 | 202 5597 | Manchester Trucks |
| Jenkins | Lionel | | I.T. Manager | LJenkins@demosaqecrm.com | 0207 | 202 5476 | Mandarin |
| Portillejo | Gareth | Mr. | Director | GPortillejo@demosaqecrm.com | 0207 | 618 692 | Mandarin |
| Jeffrees | Lisa | Ms. | I.T. Manager | LJeffrees@demosaqecrm.com | 0151 | 202 4356 | Manor Technologies |
| Saxton | David | Mr. | Commercial Manager | DSaxton@demosaqecrm.com | 01480 | 752 2567 | Manor Technologies |
| Jebsen | Lissy | | I.T. Manager | LJebsen@demosaqecrm.com | 024 | 202 2678 | Marconi Samuel Ltd. |
| Mitchell | Jane | | Director | JMitchell@demosaqecrm.com | 01494 | 403 6567 | Marconi Samuel Ltd. |

| Person Last Name | Person First Name | Salutation | Title | Person Email | Pers Phone Area Code | Pers Phone Number | Comp Name | Company ADD1 | Company ADD2 | Company ADD3 | City | Comp Post Code | Country | comp_creditshold | Comp Phone Area Code | Comp Phone Number |
|------------------|-------------------|------------|--------------|--------------------------|----------------------|-------------------|---------------|-----------------|------------------------|--------------|--------|----------------|----------------|------------------|----------------------|-------------------|
| Johnson | Les | Mr | I.T. Manager | LJohnson@demosaqecrm.com | 0208 | 203 4067 | M K Group Plc | Chiswick Centre | 414 Chiswick High Road | | LONDON | W4 5TF | United Kingdom | Yes | 0208 | 203 4000 |

| Company ADD1 | Company ADD2 | Company ADD3 | City | Comp Post Code | Country | comp_creditshold | Comp Phone Area Code | Comp Phone Number |
|--------------------------|-----------------------------|---------------------|-----------------|----------------|----------------|------------------|----------------------|-------------------|
| Chiswick Centre 2 | 414 Chiswick High Road | | LONDON | W4 5TF | United Kingdom | Yes | 0208 | 203 4000 |
| St Marys House | The Broadway | Amersham | BUCKINGHAMSHIRE | HP7 OUT | United Kingdom | No 1 | 0494 | 203 2500 |
| 165 Corporation Street | Dial Direct House | | COVENTRY | CV1 1GY | United Kingdom | Yes | 0246 | 170 5000 |
| Barnett Way 3 | Barnwood | Barnwood | GLOUCESTER | GL4 3RZ | United Kingdom | Yes | 0135 | 202 9000 |
| 3180 Park Square | Birmingham Business Park | | BIRMINGHAM | B37 7YN | United Kingdom | No | 0121 | 202 6300 |
| 1&3 New Market Court | Kingston | | MILTON KEYNES | MK10 0AG | United Kingdom | No | 01908 | 175 4500 |
| Parsonage Road | Stratton St. Marqaret | | SWINDON | SN3 4RN | United Kingdom | No | 01793 | 202 5500 |
| 2 Savoy Court | Strand | | LONDON | WC2R 0EZ | United Kingdom | No | 0207 | 202 5400 |
| Harella House | 90-98 Goswell Road | | LONDON | EC1V 7DF | United Kingdom | No | 0207 | 618 600 |
| Sir John Moores Building | 100 Old Hall Street | | LIVERPOOL | L7D 1AX | United Kingdom | No | 0151 | 202 4300 |
| Kingfisher Way | Hinchinbrooke Business Park | | HUNTINGDON | PE18 8FN | United Kingdom | Yes | 01480 | 752 2500 |
| Sapphire Court | Wallsgrave Business Park | Wallsgrave Triangle | COVENTRY | CV2 2TX | United Kingdom | Yes | 024 | 202 2600 |
| Oxford Road | Stokenchurch | | HIGH WYCOMBE | HP14 3AD | United Kingdom | No | 01494 | 403 6500 |