

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**.

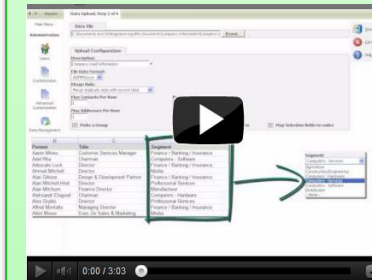
Resource Centre

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
Jenkins	Chris	Mr	IT and Systems Manager	MJenkins@demosaqecrm.com	01453	199 4636	Merrill Lynch	2, N.Z. & Mexico Generation	Albert Street		BIRMINGHAM	B3 7YN	United Kingdom	No	01453	199 4900

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	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