Sage CRM

Data Upload Workbook

Contents

About this workbook

The Data Upload feature of Sage CRM is a powerful tool that can save you time and resources when you need to add multiple new lead, company, or person records to Sage CRM or migrate data from Excel spreadsheets or third-party systems.

This workbook contains tutorials that guide you step by step through the most common use cases for the Data Upload feature. We recommend this workbook to users who want to learn how to add multiple new records to Sage CRM at once, as well as everyone who'd like to know more about Data Upload.

For complete information about Sage CRM and the latest product documentation and videos, please visit the Sage CRM Help Center.

About Data Upload

With the Data Upload feature, you can add multiple lead, company, and person records to the Sage CRM database at once without having to enter the details of each record manually in the Sage CRM user interface.

Here's how Data Upload works:
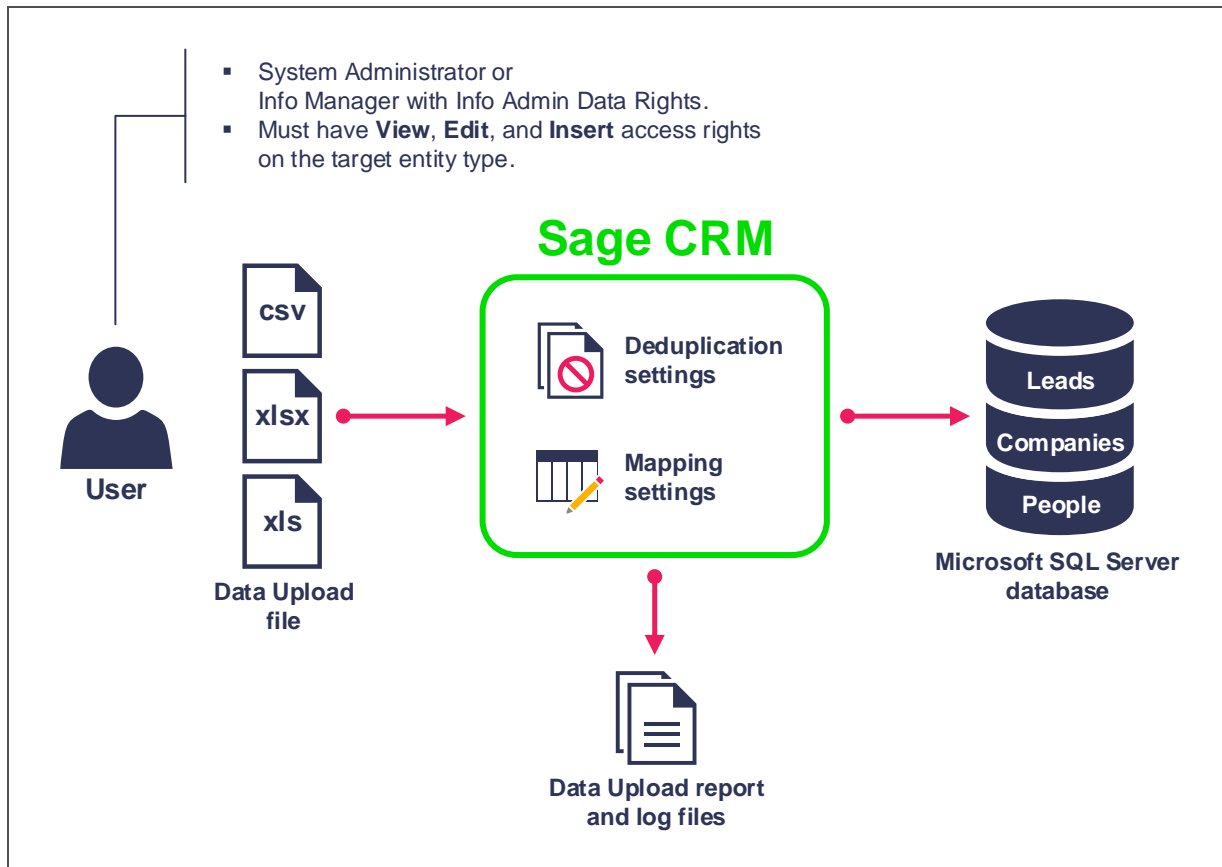
Data Upload is enabled by default after Sage CRM installation. This feature is available to System Administrators and Info Managers who have Info Admin Data Rights in Sage CRM. The account used to perform data upload must have View, Edit, and Insert access rights on the target entity type.

To upload data to Sage CRM, you need to prepare a data upload file (CSV, XLS, or XLSX) containing the records you want to add, and then specify that file in the Sage CRM user interface.

The system prompts you to configure a number of Data Upload settings, including:

- **Deduplication settings**. Add rules to detect if the records you are uploading to Sage CRM already exist in the database. If they do, Sage CRM prompts you to merge your data into the existing records, overwrite the existing records with the new ones, or skip duplicate records without adding any data to Sage CRM. You can add deduplication rules only if advanced deduplication is enabled in Sage CRM. Advanced deduplication is enabled automatically if you have included demo data in your Sage CRM installation. Otherwise, advanced deduplication is disabled and you need to enable it manually in the Sage CRM system behavior settings.

- **Mapping settings**. Associate a column in your data file with a field in the Sage CRM database. During Data Upload, data from each column is inserted into the associated field in the database. A column can have only one associated field. If a column is not associated with a field, data from that column is not added to the Sage CRM database. In most cases, Sage CRM maps file columns to database fields automatically, but you can review these mappings, change them if necessary, and add new mappings before your Data Upload begins.

Once you have configured and applied the deduplication and mapping settings, Sage CRM uses them to add your new records to the Microsoft SQL Server database. Sage CRM generates a report and log files that contain information about the data upload results and help you to identify and troubleshoot any issues if they occur.

Prepare your environment

To get the most out of this workbook, please ensure that

- You have Sage CRM 7.3 with or without any Service Pack installed.
- Basic demo data is included in Sage CRM.
- Advanced deduplication is enabled in Sage CRM.

> If you don't have sufficient permissions, ask your system administrator to configure an environment that meets the above prerequisites for you.

Basic demo data

Basic demo data contains a number of test user accounts we'll need for the tutorials in this workbook.

To check if demo data is available in Sage CRM:

1. Log on to Sage CRM as a system administrator.
2. Go to **<My Profile> | Administration | Users | Users**.
3. Search for the following user:
   Susan Maye
   If this user is found, it indicates that demo data is available.
   Otherwise, follow the steps below to add demo data.

To add basic demo data in a new installation of Sage CRM:

1. Start the Sage CRM Setup Wizard.
2. Step through the wizard until you are on the **Select Setup type** page.
3. Select the **Include basic demo data** option.
4. Complete the Setup Wizard.

Advanced deduplication

Advanced deduplication is required to avoid the creation of duplicate records in the Sage CRM database during data uploads.

Advanced deduplication is automatically enabled when you install Sage CRM with demo data, but there'll be no harm if you double-check that advanced deduplication is enabled:

1. Log on to Sage CRM as a system administrator.
2. Go to **<My Profile> | Administration | System | System Behavior**.
3. Make sure that **Deduplication** is set to **Yes**.

Before you begin uploading data

We recommend that you create a full backup of the Sage CRM database before uploading new records. A full backup enables you to roll back any changes made by Data Upload, if necessary. If you don't have a full database backup and something goes wrong while you're uploading new records, you might have to delete them from the Sage CRM database manually.

> If you don't have sufficient permissions to create full backups of the Sage CRM database, ask your SQL Server database administrator to back up the database for you.

To create a full backup of the Sage CRM database, you can use Microsoft SQL Server Management Studio. In the next example, we'll use Management Studio supplied with SQL Server 2014 to back up the Sage CRM database.

1. Open SQL Server Management Studio:
   at a command prompt, enter **ssms.exe**

2. Specify parameters to connect to the Microsoft SQL Server computer that hosts the Sage CRM database.

3. In the left pane (Object Explorer), expand the **Databases** node to locate the Sage CRM database.
   By default, the name of the database is **CRM**.

4. Right-click the Sage CRM database, point to **Tasks**, and then click **Back Up**:
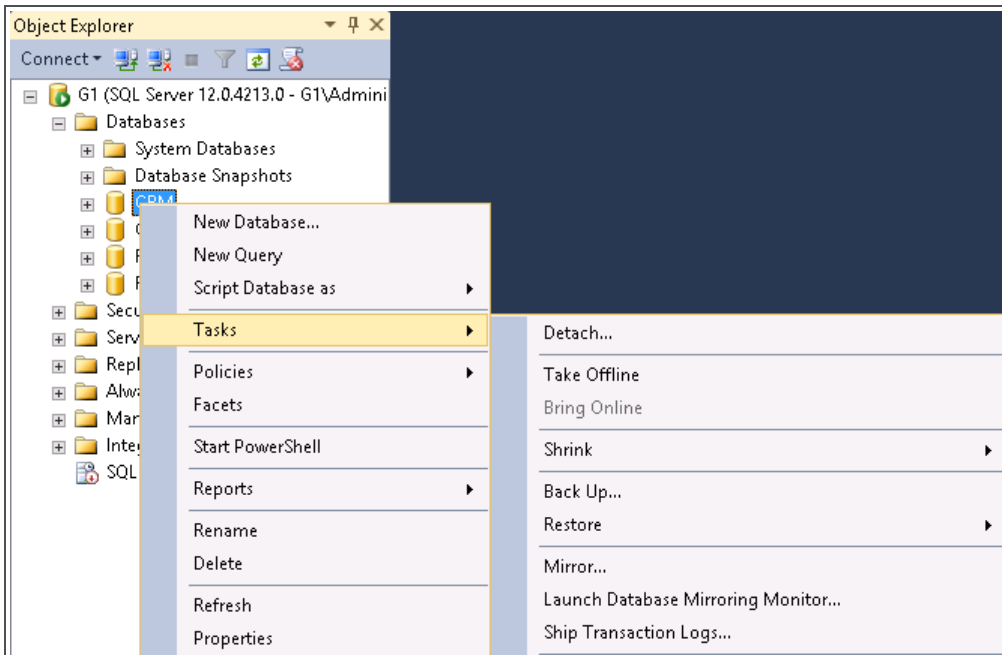
5. In the dialog box that opens, do the following:
   a. From **Backup type**, select **Full**.

   b. Under **Backup component**, select **Database**.

   c. From **Back up to**, select **Disk**.

   d. Click **OK** and wait until Management Studio backs up the database.

Now you can add new records to the database using the Data Upload feature. You can always revert to the previous version of the database using the full backup you have created.

Tutorial 1: Adding lead records

Probably the most common scenario where the Data Upload feature can help you greatly is adding multiple new lead record s to Sage CRM at once.

Let's quickly upload five new lead records and assign them to one Sage CRM user – *Susan Maye.* This user account is provided as part of the demo data supplied with Sage CRM.

To add new lead records, you need to complete the following steps:

- Step 1: Prepare a CSV file containing new lead records
- Step 2: Upload CSV file to Sage CRM
- Step 3: Configure mapping
- Step 4: Configure deduplication
- Step 5: Preview and create lead records
- Step 6 (optional): View uploaded records

Step 1: Prepare a CSV file containing new lead records

Let's prepare a small Comma-Separated Values (CSV) file containing the lead records to upload. CSV is the preferable format for data upload. Unlike Excel Workbook (XLSX or XLS) files, CSV files don't store any complex formatting, formulas, and filters that might prevent your data from uploading correctly.

> For best performance, we recommend that the maximum number of records in your data upload file shouldn't exceed 5000. If you want to upload more than 5000 records, consider creating several data upload files.

Your CSV file must contain a valid non-empty value for each required lead field in Sage CRM. Required fields are those you must fill in to create a new lead record. Such fields are marked in the Sage CRM user interface with a blue asterisk, for example:

By default, the required fields for creating a lead record are:

Field caption in the user interface	Field code in the database
Company Name	lead_companyname
Last Name	lead_personlastname
First Name	lead_personfirstname
Description	lead_description
Assigned to	lead_assigneduserid
Email	lead_personemail

The most convenient way to prepare a Sage CRM-compatible CSV file is using Microsoft Excel.

1. In Microsoft Excel, create a new blank workbook.
2. In row 1, enter the captions of the Sage CRM fields into which you want to add data:

Using field captions as column headings helps Sage CRM to automatically map each column to the corresponding field in the database. If necessary, you can review and manually change these mappings later before running your data upload. The fields you specify in your file must exist in the Sage CRM database. Although the **Assign to** field is required, we omit it in the example file because we'll assign all new lead records to one user (Susan Maye). We'll select that user later when configuring data upload settings in the Sage CRM

user interface.

The **Assign to** column must be present in the file when you want assign lead records to different users. For more information, see the note after this procedure.

3. Enter the lead records to be uploaded. Each row in the file must contain one lead record only:

	A	B	C	D	E	F
1	Company	Last Name	First Name	Description	Email	Source
2	Suir	Keane	Paul	Suir - new lead	paul.keane@demosagecrm.com	Web
3	Moy	Downhill	Jim	Moy - new lead	jim.downhill@demosagecrm.com	Phone
4	Lee	Evans	Barbara	Lee - new lead	barbara.evans@demosagecrm.com	Fax
5	Avoca	Ryan	Anna	Avoca - new lead	anna.ryan@demosagecrm.com	Tradeshow
6	Bann	Bradford	Jim	Bann - new lead	tim.bradford@demosagecrm.com	Twitter

4. Save the workbook as a CSV file named **LeadsUpload.csv**.

> You can assign lead records in the data upload file to different Sage CRM users.
> To do so, add the following two columns to the file:
> - **Assign to**. Specify the logon ID or email address of the Sage CRM user to whom you want to assign the lead record.
> - **Team**. Enter the name of the primary team to which the user belongs, as it appears in the Sage CRM user interface.
>
> In Step 2: Upload CSV file to Sage CRM, specify any team in the **Assign to Team** option. Leave the **Assign to** field blank.
> In Step 3: Configure mapping, map the **Assign to** and **Team** columns in the file to the **Lead : Assign to** and **Lead : Team** fields, accordingly.
> As a result, each uploaded record is assigned to the user specified for that record in your data upload file.

Step 2: Upload CSV file to Sage CRM

1. Log on to Sage CRM as a system administrator or user with Info Admin Data Rights.
   You can use the built-in *admin* account:

   a. On the logon screen, in **User Name**, enter **admin**.

   b. Leave **Password** blank.

   c. Click **Log On**.

2. Go to **<My Profile> | Administration | Data Management | Data Upload**.

3. Under **Data Upload**, click **Lead**, and then click **Continue**.

4. On the **Lead Data Upload** page, click **New**.

5. Configure the following upload options:

   - **Data File**. Specify the **LeadsUpload.csv** file you have prepared.

   - **Description**. Enter an informative description for your data upload, for example, **Demo leads upload**. This description identifies your data upload in the Sage CRM user interface.

   - **Assign to Users**. Add **Susan Maye** to the list.

   Keep the default values of all other options.

   > We recommend that you always select the **Make a Group** check box on this page. As a result, Sage CRM saves your data upload as a group which you can access on the **Groups** tab. This lets you view a list of all data uploads you have performed so far, as well as records created in each Data Upload.

6. Click **Save**. If prompted, confirm that you want to copy the file to the Sage CRM server.

Step 3: Configure mapping

In this step, we'll review the mapping settings automatically configured by Sage CRM and change them if necessary.

Once your file has been copied to the server, Sage CRM displays the following screen providing information about current mapping settings:

All columns in your data file have been correctly mapped to the corresponding database fields, except for the **Source** column. If this column remains unmapped, the data it contains won't be added to the Sage CRM database during data upload.

Let's map the **Source** column manually:

1. Under **Fields not mapped yet (will be ignored)**, click **Source**.
2. From **Field Name**, select **Lead : Source**.
3. Click **Save**.

Now all file columns are properly mapped to the Sage CRM database fields.

Step 4: Configure deduplication

In this step, we'll configure deduplication rules to avoid the creation of duplicate records during data upload. In our case, it's quite sufficient to add just three rules using the *Exact Match* criterion for company name, person's first name, and person's last name.

1. Configure deduplication by company name:
   a. In **Data File Column**, click **Company**.
   b. From **Dedupe Rule**, select **Exact Match**.
   c. Click **Save**.

2. Configure deduplication by person's last name:
   a. In **Data File Column**, click **Last Name**.
   b. From **Dedupe Rule**, select **Exact Match**.
   c. Click **Save**.

3. Configure deduplication by person's first name:
   a. In **Data File Column**, click **First Name**.
   b. From **Dedupe Rule**, select **Exact Match**.
   c. Click **Save**.

> If necessary, you can configure deduplication rules for other file columns as well. Click the file column name in the table, and select the rule from the **Dedupe Rule** list.
> For example, you can deduplicate companies with identical names by their addresses. To do so, add a rule based on the **Address 1** field.

With the mapping and deduplication settings configured, the list of columns in the data file should look as follows:

Data File Column	Dedupe Rule	Sample Data	Field Name	Actual Field
Company	Exact Match	Suir	Company Name	lead_companyname (WideString 60)
Last Name	Exact Match	Keane	Last name	lead_personlastname (WideString 30)
First Name	Exact Match	Paul	First name	lead_personfirstname (WideString 30)
Description		Suir - new lead	Description	Lead_Description (WideString 40)
Email		paul.keane@demosagecrm.com	E-mail	Lead_PersonEMail (WideString 255)
Source		Web	Source	lead_source (WideString 40)

Step 5: Preview and create lead records

1. Click **Preview Data Upload** to preview the list of lead records to be created in the Sage CRM database. Keep the default settings on the page that opens.

2. Click **Do Upload** to create the new records in the database.

When your data upload is finished, Sage CRM displays the upload results:

Upload Results

Number of Rows Processed	5
Invalid Rows Ignored	0
New Leads Added	5
Duplicate Leads	0

View Log File

Group Created	Import from LeadsUpload.csv

Step 6 (optional): View uploaded records

Once the Data Upload has finished, you can view the new lead records in Sage CRM to ensure they have been added correctly. If necessary, you can edit the new records or reassign them to other users.

1. In the top right corner of the Sage CRM window, click the magnifying glass icon (🔍), and then click **Lead**.

2. In **Assigned to**, enter **Susan Maye**.

3. Click **Find** and wait until Sage CRM displays search results:

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Status ▲	Company Name	First name	Last name	Description	Stage	Assigned to	Territory
➡	Suir	Paul	Keane	Suir - new lead	New Lead	Susan Maye	US & Canada
➡	Moy	Jim	Downhill	Moy - new lead	New Lead	Susan Maye	US & Canada
➡	Lee	Barbara	Evans	Lee - new lead	New Lead	Susan Maye	US & Canada
➡	Avoca	Anna	Ryan	Avoca - new lead	New Lead	Susan Maye	US & Canada
➡	Bann	Tim	Bradford	Bann - new lead	New Lead	Susan Maye	US & Canada

Sage CRM has automatically assigned territory (US & Canada) to the new lead records, because this territory is set in Susan Maye's user profile.

4. In the **Description** column, click the lead description to open the record.
   You can change or delete the record if necessary.

Tutorial 2: Adding company and associated person records

Now that we have added new lead records in Tutorial 1: Adding lead records, let's see how to upload company records and person records associated with them. For each company record being uploaded, you must add one or more associated person records. Person records associated with a company are also known as *contacts*. You can set one of them as the *main company contact*—this contact is displayed on the company summary tab.

> For best performance, we recommend that the maximum number of records in your data upload file shouldn't exceed 5000. If you want to upload more than 5000 records, consider creating several data upload files.

In this tutorial, we'll upload two company records and two person records associated with each company. We'll see how to prepare your .csv file, set the main contact for a company, and configure data upload settings in Sage CRM.

In terms of steps you need to complete, this scenario is very similar to uploading lead records:

- Step 1: Prepare a CSV file containing company and person records
- Step 2: Upload CSV file to Sage CRM
- Step 3: Configure mapping
- Step 4: Configure deduplication
- Step 5: Preview and create company and person records
- Step 6 (optional): View uploaded records

Step 1: Prepare a CSV file containing company and person records

Let's prepare a comma-separated values (.csv) file for uploading company and person records. Make sure your file contains values for all fields that are required to create a new company record in the Sage CRM database.

By default, the required fields are:

Field caption in the user interface	Field code in the database
Company Name	comp_name
Address 1	addr_address1
Last Name	pers_lastname
First Name	pers_firstname

1. In Microsoft Excel, create a new blank workbook.

2. In row 1, enter the captions of the Sage CRM fields into which you want to add data:

	A	B	C	D	E	F	G
1	Company	Address 1	City	Last Name	First Name	Email	Mobile
2							
3							
4							
5							

3. Enter the company and person records to be uploaded:

	A	B	C	D	E	F	G
1	Company	Address 1	City	Last Name	First Name	Email	Mobile
2	Nore	1 Garden Way	Sligo	Hackett	Steve	steve.hackett@demosagecrm.com	123456789
3	Nore	1 Garden Way	Sligo	Moore	George	george.moore@demosagecrm.com	987654321
4	Liffey	2 Fruit Close	Galway	Carr	Iris	iris.carr@demosagecrm.com	567891234
5	Liffey	2 Fruit Close	Galway	Murdoch	Marina	marina.murdoch@demosagecrm.com	432198765

Each row must contain one person record only. If you want to add another person associated with the same company, use a different row and enter the same company details for that person record.
The first person specified for a company in the file becomes the *main company contact*. You can change the main company contact later in the Sage CRM user interface.

4. Save the workbook as a CSV file named **CompaniesPeopleUpload.csv**.

Step 2: Upload CSV file to Sage CRM

1. Log on to Sage CRM as a system administrator or user with Info Admin Data Rights.
   You can use the built-in *admin* account:

   a. On the logon screen, in **User Name**, enter **admin**.

   b. Leave **Password** blank.

   c. Click **Log On**.

2. Go to **<My Profile> | Administration | Data Management | Data Upload**.

3. Under **Data Upload**, click **Company**, and then click **Continue**.

4. On the **Company and People Data Upload** page, click **New**.

5. Configure the following upload options:

   - **Data File**. Specify the **CompaniesPeopleUpload.csv** file you have prepared.

   - **Description**. Enter an informative description for your data upload, for example, **Demo companies and people upload**.

   Keep the default values of all other options.

6. Click **Save**. If prompted, confirm that you want to copy the file to the Sage CRM server.

Step 3: Configure mapping

Let's review the mapping settings automatically configured by Sage CRM and change them if necessary.

Once your file has been copied to the server, Sage CRM displays the following screen:

Data File Column	Dedupe Rule	Sample Data		Belongs to		Data Table	Field Name	Actual Field	Type
Company		Nore	🏢	Company			Company Name	Comp_Name (WideString 60)	
Last Name		Hackett	👤	Person			Last Name	Pers_LastName (WideString 40)	
First Name		Steve	👤	Person			First Name	Pers_FirstName (WideString 30)	
Address 1		1 Garden Way	👤	Person	📧	Address	Address 1	Addr_Address1 (WideString 40)	
City		Sligo	👤	Person	📧	Address	City	Addr_City (WideString 30)	
Email		steve.hackett@demosagecrm.com	👤	Person	✉	E-mail	E-mail Address	Emai_EmailAddress (WideString 255)	Business
Fields not mapped yet (will be ignored)									
Mobile		123456789							

Not mapped file column

Address 1 and City columns are erroneously mapped to person

As you may notice, Sage CRM has incorrectly mapped the **Address 1** and **City** columns. These columns are mapped to person, but in fact they contain company's address and city.

The **Mobile** column is not mapped to any database field, which means that its data won't be added to the Sage CRM database during data upload.

Let's change these mappings:

1. Remap the **Address 1** column:
   a. In **Data File Column**, click **Address 1**.
   b. From **Belongs to**, select **Company**.
   c. Keep **Company Address Type** blank.
   d. Click **Save**.

2. Remap the **City** column:
   a. In **Data File Column**, click **City**.
   b. From **Belongs to**, select **Company**.
   c. Keep **Company Address Type** blank.
   d. Click **Save**.

3. Map the **Mobile** column:
   a. In the **Fields not mapped yet (will be ignored)** table, click **Mobile**.
   b. From **Belongs to**, select **Person**.
   c. From **Data Table**, select **Phone**.
   d. From **Field Name**, select **Phone : Phone Number**

e. From **Person Phone Type**, select **Business**.

f. Click **Save**.

> It is very important to select the same type for all company address fields. Usually, you can leave the type blank, as we did in case with the **Address 1** and **City** fields above.

Now all file columns are properly mapped to Sage CRM database fields.

Step 4: Configure deduplication

In this step, we'll configure deduplication to avoid the creation of duplicate records during data upload. In addition to deduplication rules by company name, person's last name, and person's first name, let's configure a rule to deduplicate companies with identical names by their address.

1. Configure deduplication by company name:
   a. In **Data File Column**, click **Company**.
   b. From **Dedupe Rule**, select **Exact Match**.
   c. Click **Save**.

2. Configure deduplication by company address:
   a. In **Data File Column**, click **Address 1**.
   b. From **Dedupe Rule**, select **Exact Match**.
   c. Click **Save**.

3. Configure deduplication by person's last name:
   a. In **Data File Column**, click **Last Name**.
   b. From **Dedupe Rule**, select **Exact Match**.
   c. Click **Save**.

4. Configure deduplication by person's first name:
   a. In **Data File Column**, click **First Name**.
   b. From **Dedupe Rule**, select **Exact Match**.
   c. Click **Save**.

With the mapping and deduplication settings configured, the list of columns in the data file should look as follows:

Data File Column	Dedupe Rule	Sample Data		Belongs to		Data Table	Field Name	Actual Field	Type
Company	Exact Match	Nore		Company			Company Name	comp_name (WideString 60)	
Address 1	Exact Match	1 Garden Way		Company		Address	Address 1	addr_address1 (WideString 40)	
City		Sligo		Company		Address	City	addr_city (WideString 30)	
Last Name	Exact Match	Hackett		Person			Last Name	pers_lastname (WideString 40)	
First Name	Exact Match	Steve		Person			First Name	pers_firstname (WideString 30)	
Email		steve.hackett@demosagecrm.com		Person		E-mail	E-mail Address	Emai_EmailAddress (WideString 255)	Business
Mobile		123456789		Person		Phone	Phone Number	phon_number (WideString 20)	Business

Step 5: Preview and create company and person records

1. Click **Preview Data Upload** to preview the list of company and people records to be created in the Sage CRM database. Keep the default settings on the page that opens.
2. Click **Do Upload** to create the new records in the database.

When your data upload is finished, Sage CRM displays the upload results:

Upload Results

Number of Rows Processed	4
Invalid Rows Ignored	0
New Companies Added	2
New People Added	4
Duplicate Companies	0
Duplicate People	0

View Log File

Group Created	Import from CompaniesPeopleUpload.csv

Step 6 (optional): View uploaded records

Once the Data Upload has finished, you can view the new company and associated people records added to Sage CRM:

1. In the top right corner of the Sage CRM window, click the magnifying glass icon (🔍), and then click **Company**.

2. In **Company Name**, type **Nore**.

3. Click **Find** and wait until Sage CRM displays search results:

Company Name	City	Phone	Business E-mail	Website	Territory
Nore	Sligo	123456789	steve.hackett@demosagecrm.com		Worldwide

1 Company, Page 1 of 1

4. In the **Company Name** column, click **Nore** to view the company details.
   The main contact set for the company is Steve Hackett, because this was the first person specified for the Nore company in the data upload file in Step 1: Prepare a CSV file containing company and person records.

5. Click the **People** tab to view the person records associated with the company:

Person	Title	Phone Full Number	Business E-mail	Territory	Type
Steve Hackett		123456789	steve.hackett@demosagecrm.com	Worldwide	
George Moore		987654321	george.moore@demosagecrm.com	Worldwide	

2 People, Page 1 of 1

You can click the person records to view their details, change them, or delete these records if necessary.

Repeat the above steps for the Liffey company.

Tutorial 3: Adding person records

In this tutorial, we'll use the Data Upload feature to add several person records not associated with any company.

The steps for adding person records aren't any different from leads and companies:

- Step 1: Prepare a CSV file containing person records
- Step 2: Upload CSV file to Sage CRM
- Step 3: Configure mapping
- Step 4: Configure deduplication
- Step 5: Preview and create person records
- Step 6 (optional): View uploaded records

Step 1: Prepare a CSV file containing person records

To add a person record, you must populate a number of required fields.
By default, these fields are:

Field caption in the user interface	Field code in the database
Last Name	pers_lastname
First Name	pers_firstname
Address 1	addr_address1

1. In Microsoft Excel, create a new blank workbook.

2. In row 1, enter the captions of the Sage CRM fields into which you want to add data:

	A	B	C	D	E	F
1	Last Name	First Name	Email	Mobile	Address 1	City
2						
3						
4						

In addition to the required fields, we are going to populate three optional ones: **Email**, **Mobile**, and **City**.

3. Enter the person records to be uploaded. Each row in the file must contain one person record only:

	A	B	C	D	E	F
1	Last Name	First Name	Email	Mobile	Address 1	City
2	Rose	Amy	amy.rose@demosagecrm.com	123456789	1 Flower Lane	Armagh
3	Black	Jim	jim.black@demosagecrm.com	987654321	2 Brick Road	Armagh
4	Green	Michael	michael.green@demosagecrm.com	567891234	3 Tree Place	Armagh

4. Save the workbook as a CSV file named **PeopleUpload.csv**.

Step 2: Upload CSV file to Sage CRM

1. Log on to Sage CRM as a system administrator or user with Info Admin Data Rights.
   You can use the built-in *admin* account:
   a. On the logon screen, in **User Name**, enter **admin**.

   b. Leave **Password** blank.

   c. Click **Log On**.

2. Go to **<My Profile> | Administration | Data Management | Data Upload**.

3. Under **Data Upload**, click **Individuals**, and then click **Continue**.

4. On the **Individual Data Upload** page, click **New**.

5. Configure the following upload options:

   - **Data File**. Specify the **PeopleUpload.csv** file you have prepared.

   - **Description**. Enter an informative description for your data upload, for example, **Demo people upload**.

   Keep the default values of all other options.

6. Click **Save**. If prompted, confirm that you want to copy the file to the Sage CRM server.

Step 3: Configure mapping

Once your file has been copied to the server, Sage CRM displays the following screen:

Data File Column	Dedupe Rule	Sample Data		Belongs to		Data Table	Field Name	Actual Field	Type
Last Name		Rose	👤	Person			Last Name	Pers_LastName (WideString 40)	
First Name		Amy	👤	Person			First Name	Pers_FirstName (WideString 30)	
Address 1		1 Flower Lane	👤	Person	✉	Address	Address 1	Addr_Address1 (WideString 40)	
City		Armagh	👤	Person	✉	Address	City	Addr_City (WideString 30)	
Email		amy.rose@demosagecrm.com	👤	Person	✉	E-mail	E-mail Address	Emai_EmailAddress (WideString 255)	Business
Fields not mapped yet (will be ignored)									
Mobile		123456789							

Not mapped file column

Except for the **Mobile** column, all columns in the file were automatically mapped to the correct fields in the database.

Let's map the **Mobile** column manually and specify its data type:

1. Under **Fields not mapped yet (will be ignored)**, click **Mobile**.
2. Configure the following options:
   - **Data Table**. Select **Phone**.
   - **Field Name**. Select **Phone : Number**.
   - **Person Phone Type**. Select **Business**.
3. Click **Save**.

Step 4: Configure deduplication

Let's configure deduplication rules to avoid the creation of duplicate person records in the Sage CRM database during data upload.

1. Configure deduplication by last name:
    a. In **Data File Column**, click **Last Name**.

    b. From **Dedupe Rule**, select **Exact Match**.

    c. Click **Save**.

2. Configure deduplication by first name:
    a. In **Data File Column**, click **First Name**.

    b. From **Dedupe Rule**, select **Exact Match**.

    c. Click **Save**.

With the mapping and deduplication settings configured, the list of columns in the data file should look as follows:

Data File Column	Dedupe Rule	Sample Data		Belongs to		Data Table	Field Name	Actual Field	Type
Last Name	Exact Match	Rose	👤	Person			Last Name	pers_lastname (WideString 40)	
First Name	Exact Match	Amy	👤	Person			First Name	pers_firstname (WideString 30)	
Address 1		1 Flower Lane	👤	Person	✉	Address	Address 1	Addr_Address1 (WideString 40)	
City		Armagh	👤	Person	✉	Address	City	Addr_City (WideString 30)	
Email		amy.rose@demosagecrm.com	👤	Person	✉	E-mail	E-mail Address	Emai_EmailAddress (WideString 255)	Business
Mobile		123456789	👤	Person	📞	Phone	Phone Number	phon_number (WideString 20)	Business

Step 5: Preview and create person records

1. Click **Preview Data Upload** to review the list of person records to be created in the Sage CRM database. Keep the default settings on the page that opens.
2. Click **Do Upload** to create the new records in the database.

When your data upload is finished, Sage CRM displays the upload results:

Upload Results

Number of Rows Processed	3
Invalid Rows Ignored	0
New Companies Added	0
New People Added	3
Duplicate Companies	0
Duplicate People	0

View Log File

Group Created	Import from PeopleUpload.csv

Step 6 (optional): View uploaded records

Once the Data Upload has finished, you can view the new person records in Sage CRM and edit them if necessary:

1. In the top right corner of the Sage CRM window, click the magnifying glass icon (⊙), and then click **Person**.

2. In **City**, type **Armagh**.

3. Click **Find** and wait until Sage CRM displays search results:

Last Name ▲	First Name	Company Name	Phone Full Number	Business E-mail	Territory
Black	Jim		987654321	jim.black@demosagecrm.com	Worldwide
Green	Michael		567891234	michael.green@demosagecrm.com	Worldwide
Rose	Amy		123456789	amy.rose@demosagecrm.com	Worldwide

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4. In the **Last Name** column, click the name of the person record you want to open.
   You can change or delete the record if necessary.