## Introduction to PeopleImport

One of the greatest challenges facing many Salesforce customers is how to import and process large lists of Contact/Lead data relative to the data already inside their Salesforce databases.

For example, when returning from a large tradeshow with a list of a few thousand attendees, how do they get loaded into Salesforce? Are some of them already in the system as a Lead or as a Contact? Won't importing create duplicates? Not with PeopleImport.

PeopleImport has been designed to solve these issues, as well as addressing the marketing tasks and campaigning requirements also associated with lists of people based data.

Administrators can develop import mappings and dedupe rules for marketing users with PeopleImport
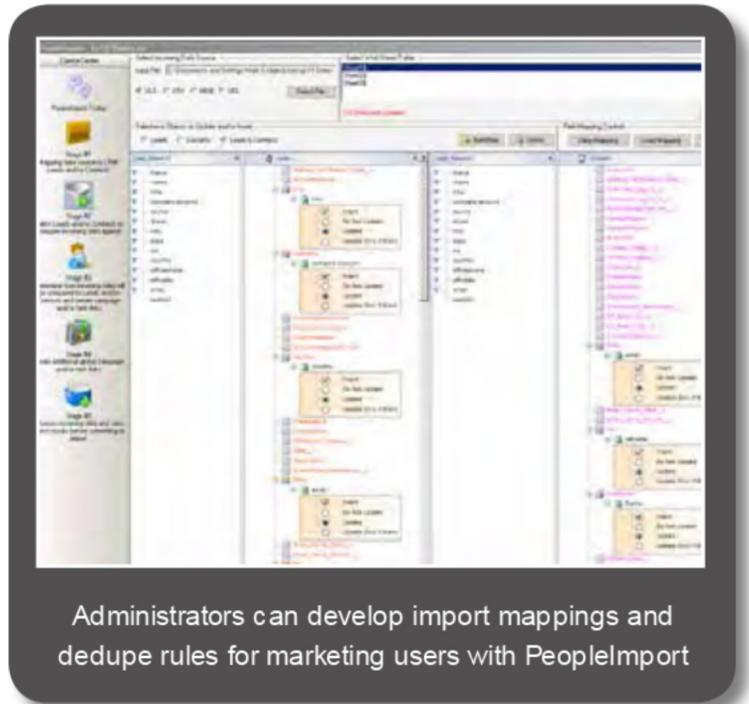
Product Overview

PeopleImport has been designed to be the professional AND cost effective way to import Leads, Accounts and Contacts into Salesforce responsibly. PeopleImport is a standalone Windows based application available to any Salesforce Professional, Enterprise or Unlimited customer; administrators and non-administrators alike can use PeopleImport. PeopleImport provides an alternative to importing data through the user interface. The normal multi-process job of list importing/deduplicating/tasking and campaign linking is condensed into one single easy operation.

PeopleImport brings the following capabilities to Salesforce clients:

- Ability to import records in a single pass, effecting Leads, Contacts and Accounts.
- At the same time create all the required Tasks to properly record the post import activities, including attaching the appropriate campaigns.
- Administrators can set-up import scenarios and distribute to other users, maintaining control on how data is imported.

The PeopleImport Process

Screen #1 – Defining Mappings

Because PeopleImport has the ability to import into both Leads and Contacts at the same time, the incoming data source (XLS, MDB, CSV or Queue) can be mapped to the Contact and/or to the Lead table. Most customers would map to both Leads and Contacts, in addition to the mapping you also specify mapping conditions (when to insert, when to update etc.)
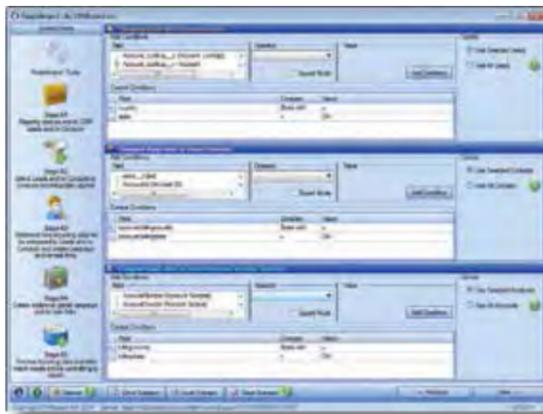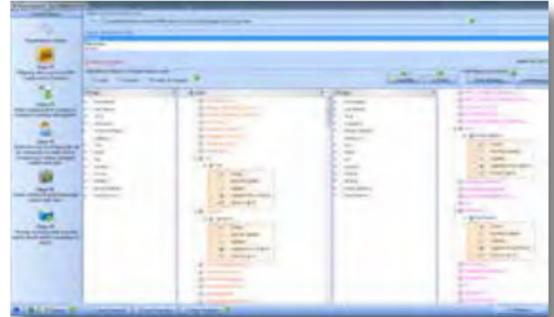
Screen #2 – Deciding What to Compare Against

Deciding which Leads and which Contacts the incoming data should be compared against. To support the largest of customers PeopleImport allows you to decide which Leads and which Contacts the incoming data will be compared against.

Screen #3 & #4 – Comparison Criteria

Step 3 is where the user con gures PeopleImport to perform multiple custom comparisons between the incoming data and the data in Salesforce. Different passes against the Lead and Contact/Account (using CRMfusion matching algorithms) are possible and along each matching step there is the ability to create events and campaign linkages.
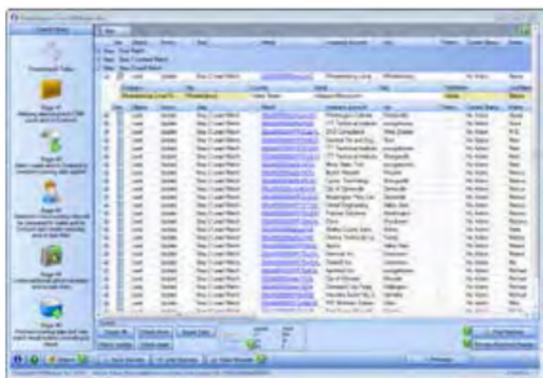
Screen #5 – Results

In step 5 PeopleImport gives you a row by row preview of what will happen to the new incoming data. What will be inserted and what records will be updated. After reviewing all the results the user simply selects to import the records. The inserts, updates to both Leads, Contacts and Accounts are done as well as the creation of the Campaign links and Events and Tasks.