

# BlueCamroo in your business

Your Guide to Implementing & Adopting BlueCamroo.

**Control**  
sales pipeline



**Manage**  
tasks & projects



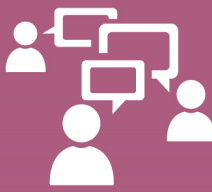
**Support**  
your clients



**Get Social**  
with Social Scout



**Collaborate**  
with your team



**Customize**  
and make it your own



**Automate**  
with Workflow Rules



**Accelerate**  
your business



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## Appendix 2 – Guide to Importing Data

Many of our customers tell us that the key moment for them getting started with actually using BlueCamroo day-to-day in their organization was when they got their existing customer and contact details into the system and — well — just started using it! So if you're ready to import your existing contact data, here are some tips:

1. Understand how BlueCamroo imports your data to People, Organizations, and “Contacts”

When you import data to BlueCamroo, the system will create records in People, in Organizations, and in “Contacts” (records that join up People with the Organizations where they work). Each row of your data file is processed in turn to add your data, as follows:

A row that contains:	Creates the following records:
First Name, Last Name and <b>unique</b> Company Name, e.g.: <b>Charlie Lewis</b> , CEO of <b>Acme Widgets</b>	A Person ( <b>Charlie Lewis</b> ), using First Name, Last Name and any other personal data.  An Organization ( <b>Acme Widgets</b> ), using Company Name and any other organizational data.  A “Contact” record, relating Person to Organization ( <b>Charlie</b> works at <b>Acme Widgets</b> , where he is CEO), using any available ‘role’-related data.
First Name, Last Name, and no Company Name, e.g. <b>Jane Harris</b>	A Person ( <b>Jane Harris</b> ), using First Name, Last Name and any other personal data.
A <b>unique</b> Company Name, but no First Name / Last Name, e.g. <b>Elegant Widgets</b>	An Organization ( <b>Elegant Widgets</b> ), using Company Name and any other organizational data

All these examples are for **unique** data. The system also has rules for importing **non-unique** data:

A row that contains:	Is processed as follows:
A <b>non-unique</b> (i.e. repeated) Company Name, and no First Name / Last Name, e.g. <b>Elegant Widgets</b> (again)	No data added. The system will report a rejected duplicate entry.
First Name, Last Name and <b>non-unique</b> Company Name, e.g.: <b>Cameron Sawyer</b> , Head of Procurement at <b>Acme Widgets</b>	The duplicate Organization data is rejected.  A new Person ( <b>Cameron Sawyer</b> ) is created, working at the already-imported Organization ( <b>Cameron</b> works at <b>Acme Widgets</b> , where he is Head of Procurement.)
<b>Non-unique</b> First Name and Last Name (with or without Company Name)	The system has no way of determining whether this is a duplicate, or another person with the same name, so it creates a new Person and — if applicable — a new Contact Record.

2. Clean your data

BlueCamroo is a CRM System — not just a Contact List. That may sound like stating the obvious, but it has some important consequences if your data is currently in a simple Contact Manager like Outlook or Google Contacts. Simple tools like that aren't too fussy about what data you put in. Phone number in the Email field? Duplicate record? No problem! CRM systems — such as BlueCamroo — need more accurate data to work properly, however. So if you're importing data that began its life in a simple Contact Manager, or even just on a spreadsheet, you'll need to spend a little time checking and preparing it before you import into BlueCamroo.

So, let's say you've exported your data from wherever it is now into a "CSV" (Comma Separated Values) text file. Open it up (in Excel is easiest, if you have it installed — and you can save the file in Excel format when you're finished), and check  the following:

- Do all the columns ("fields") have headings?** If not, add some column headings ("field names") to identify the data.
- Are all the column headings plain text?** Please remove any 'special characters', such as "&", "/", "#", etc. (Spaces are fine).
- Is all the data in the correct columns ("fields")?** Check for data that doesn't "fit" the column it has been entered into. Examples might include email addresses in a phone number field; website address in an email field, etc.
- Do you have duplicate emails in your import file?** Quickly scan your import file to make sure you don't have the same email entered twice (sorting on your email column is a quick way of catching duplicates). You cannot have multiple records in BlueCamroo with the same email (as this is the main way BlueCamroo identifies a 'unique' record). Attempting to import multiple records with the same email will produce an error on your import report.
- If you have multiple Contacts at a Company, is the Company data consistent on each Row?** We explained above how BlueCamroo treats unique and non-unique Organization data in your import. If you have multiple People who are Contacts at a single Company ("Organization"), make sure you tidy up the data so that all the Organization data such as address, website etc. is identical on each row for that Company.
  - If you are importing People or Contacts, do you have columns for First Name AND Last Name?** It's fine to have rows with no Person data (i.e. just an Organization to add), but if First Name is populated there must be a Last Name, and vice versa. Often, if you don't know one part of the name you can guess it from an email address (easy if it's "john.smith@acme.com!"), but if you're stuck just add a 'dot' so there is some data. (e.g. First Name="John"; Last Name="."). Alpha sort on these name columns to quickly group and find blanks. Also, many import lists have a Full Name column. BlueCamroo requires that you have separate

columns for First Name and Last Name. You can either do this manually, or you can follow this handy guide by [Microsoft](#)<sup>1</sup>.

3. Check (and add) 'coding' data

As long as your data satisfies the rules above, at least the basic information should load. For a more complete import, you'll also want to do the following:

- Update the 'Lookup Values' in BlueCamroo** so that they match the data you intend to import (or, alternatively, update your data file). Lookup values to match include:
  - Industry and Sector  
access [System Navigation Panel | Setup | Lookup Values | Industries and Sectors](#)
  - Title (e.g. Mr, Mrs, etc.)  
access [System Navigation Panel | Setup | Lookup Values | Titles](#)
  - Annual Revenue (Defined ranges; not numeric input)  
access [System Navigation Panel | Setup | Lookup Values | Annual Revenue](#)
  - Number of Employees (Defined ranges; not numeric input)  
access [System Navigation Panel | Setup | Lookup Values | Number of Employees](#)
  - Source  
access [System Navigation Panel | Setup | Lookup Values | Customer Sources](#)
- Identify your Leads, Customers and Suppliers.** Every Person and every Organization in BlueCamroo can be a Customer, a Supplier, both, or neither. You may wish to add two Columns ("fields") to your data to hold **Customer Type** and **Supplier Type**, and mark up your Customers and Suppliers so you can import this data too.

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<sup>1</sup> If your PDF reader does not support hyperlinks: <http://office.microsoft.com/en-ca/excel-help/split-names-by-using-the-convert-text-to-columns-wizard-HA010102340.aspx>

Note that 'Lead' is a Customer Type: if a Person or an Organization is a Lead, they can't also be another type of Customer. Note also that if ALL the records you wish to import are just one type of Customer (and, optionally, one type of Supplier), you can skip this step and set the Types as you run your import.

Make sure the Customer Types and Supplier Types you input match Customer and Supplier Types set up in your BlueCamroo workspace! Check this at:

access [System Navigation Panel | Setup | Lookup Values | Customer Types](#),  
and  
access [System Navigation Panel | Setup | Lookup Values | Supplier Types](#).

- ❑ **Look at the available BlueCamroo fields again, is something important from your import file missing? Add it!** If an important field that you track about your leads, customers, etc. is missing (such as customer number, or birthdays, etc.) don't worry! You can add this field through extra fields in your setup. Just make sure that you are adding the extra field to the correct section, and make sure you add it before you import. This will ensure that your important fields will be added as mappable BlueCamroo fields and will be added to your records when you successfully import.
- ❑ **Plan your attack:** The best way to do a successful import is understand what fields can be populated in BlueCamroo and what kind of data goes in these fields. The tables below are broken down into the four kinds of imports you can do in BlueCamroo (Import organizations and contacts, add contacts to existing organizations, import organizations only, import people only). Each table (the left column) gives you a complete list of every BlueCamroo field that can be populated during the import. As well, the right column of the table ("Record Type") indicates what kind of data has to be in your import file's cells to be compatible with BlueCamroo. There are two types:

**Normal:** If the type is normal, you're not restricted as to what can be in the import file cell. It's a normal form text field. For example, Organization Name is a text field. It will accept any kind of alpha-numeric text. The import cell, likewise, can be any alpha-numeric text.

**Drop Down:** Okay things get a little tricky when you're trying to import data into what is represented in BlueCamroo by a drop-down box. For example,

organization and person records have a *Country* drop-down box. The names of your countries in your import file must match exactly what appears in the BlueCamroo *Country* drop-down box. For example, BlueCamroo calls the USA "United States". If your import file uses "USA", "United States of America" or other variations, you'll need to Find/Replace all to match "United States" as found in the BlueCamroo *Country* drop-down box. The *Province* field for some countries (United States, Canada, United Kingdom, and Australia) are drop-down boxes. States and provinces are spelled out exactly in the drop-down box. If your import file uses 2 or 3 letter codes (MI, WA, ONT, MAN, etc.), do a Find/Replace and convert these to their full names (Michigan, Washington, Ontario, Manitoba...). For other countries (France, South Korea, etc.), BlueCamroo treats the Province field as a Normal field (unless you've manually added [Regions](#) via [Setup | Accounting | Countries Serviced](#)).

Finally, many of the drop-down boxes are unique BlueCamroo **Lookup Values**. Fields like *Customer Type*, *Lead Type*, *Supplier Type*, *Source*, and *Industry* are lookup values. So, if you are trying to set which records are customers, leads, and suppliers, these fields must match the available lookup values exactly. If your import file indicates their industry or where the lead/customer originally came from, you'll need to scan down your columns and ensure they match the equivalent BlueCamroo lookup value.

FIELDS FOR IMPORTING ORGANIZATION AND CONTACT	
ORGANIZATION	RECORD TYPE
<b>Organization Name</b>	Normal
Description	Normal
Lead Type	Drop Down (BlueCamroo lookup value)
Lead Status	Drop Down (BlueCamroo lookup value)
Customer Type	Drop Down (BlueCamroo lookup value)
Customer Status	Drop Down (BlueCamroo lookup value)
Supplier Type	Drop Down (BlueCamroo lookup value)
Supplier Status	Drop Down (BlueCamroo lookup value)
Industry	Drop Down (BlueCamroo lookup value)
Sector	Drop Down (BlueCamroo lookup value)

Annual Revenue	Drop Down (BlueCamroo lookup value)
Number of Employees	Drop Down (BlueCamroo lookup value)
Website	Normal
Price Book	Drop Down (BlueCamroo lookup value)
Source	Drop Down (BlueCamroo lookup value)
<b>PERSON</b>	<b>RECORD TYPE</b>
First Name	Normal
Last Name	Normal
Title	Drop Down (BlueCamroo lookup value)
Home Phone	Normal
Personal Mobile	Normal
Home Fax	Normal
<b>CONTACT</b>	<b>RECORD TYPE</b>
Job Title	Normal
Department	Drop Down (BlueCamroo lookup value)
Primary Contact	Drop Down (BlueCamroo lookup value)
Receive Invoice	Drop Down (BlueCamroo lookup value)
Language	Drop Down (BlueCamroo lookup value)
Time Zone	Drop Down (BlueCamroo lookup value)
Work Phone	Normal
Work Mobile	Normal
<b>EMAIL</b>	<b>RECORD TYPE</b>
Email	Normal
In Mailing List	Drop Down (BlueCamroo lookup value)
<b>ADDRESS</b>	<b>RECORD TYPE</b>
Street	Normal
Street 2	Normal
Street 3	Normal
City	Normal
State	Drop Down (for United States, Canada, United Kingdom, and Australia) or Normal (by default for others)

Zip	Normal
Country	Drop Down
Phone	Normal
Fax	Normal
<b>ORGANIZATION SOCIAL NETWORK</b>	<b>RECORD TYPE</b>
Facebook	Normal
Linkedin	Normal
Twitter	Normal
<b>CONTACT SOCIAL NETWORK</b>	<b>RECORD TYPE</b>
Facebook	Normal
Linkedin	Normal
Twitter	Normal
<b>ORGANIZATION EXTRA FIELDS</b>	<b>RECORD TYPE</b>
Facebook	Normal
Linkedin	Normal
Twitter	Normal

FIELDS FOR ADDING CONTACTS TO EXISTING ORGANIZATIONS	
CONTACT	RECORD TYPE
First Name	Normal
Last Name	Normal
Title	Drop Down (BlueCamroo lookup value)
Job Title	Normal
Department	Drop Down (BlueCamroo lookup value)
Primary Contact	Drop Down (BlueCamroo lookup value)
Receive Invoice	Drop Down (BlueCamroo lookup value)
Language	Drop Down (BlueCamroo lookup value)
Time Zone	Drop Down (BlueCamroo lookup value)
Work Phone	Normal
Work Mobile	Normal
<b>EMAIL</b>	<b>RECORD TYPE</b>
Email	Normal

In Mailing List	Drop Down (BlueCamroo lookup value)
<b>PERSONAL SOCIAL NETWORK</b>	<b>RECORD TYPE</b>
Facebook	Normal
Linkedin	Normal
Twitter	Normal

FIELDS FOR IMPORTING ORGANIZATION ONLY	
ORGANIZATION	RECORD TYPE
<b>Organization Name</b>	Normal
Description	Normal
Lead Type	Drop Down (BlueCamroo lookup value)
Lead Status	Drop Down (BlueCamroo lookup value)
Customer Type	Drop Down (BlueCamroo lookup value)
Customer Status	Drop Down (BlueCamroo lookup value)
Supplier Type	Drop Down (BlueCamroo lookup value)
Supplier Status	Drop Down (BlueCamroo lookup value)
Industry	Drop Down (BlueCamroo lookup value)
Sector	Drop Down (BlueCamroo lookup value)
Annual Revenue	Drop Down (BlueCamroo lookup value)
Number of Employees	Drop Down (BlueCamroo lookup value)
Website	Normal
<b>Price Book</b>	Drop Down (BlueCamroo lookup value)
Source	Drop Down (BlueCamroo lookup value)
<b>ADDRESS</b>	<b>RECORD TYPE</b>
Street	Normal
Street 2	Normal
Street 3	Normal
City	Normal
State	Drop Down (for United States, Canada, United Kingdom, and Australia) or Normal (by default for others)

Zip	Normal
Country	Drop Down
Phone	Normal
Fax	Normal
<b>ORGANIZATION SOCIAL NETWORK</b>	<b>RECORD TYPE</b>
Facebook	Normal
Linkedin	Normal
Twitter	Normal

FIELDS FOR IMPORTING PERSON ONLY	
PERSON	RECORD TYPE
<b>First Name</b>	Normal
<b>Last Name</b>	Normal
Title	Drop Down (BlueCamroo lookup value)
Lead Type	Drop Down (BlueCamroo lookup value)
Lead Status	Drop Down (BlueCamroo lookup value)
Customer Type	Drop Down (BlueCamroo lookup value)
Customer Status	Drop Down (BlueCamroo lookup value)
Supplier Type	Drop Down (BlueCamroo lookup value)
Supplier Status	Drop Down (BlueCamroo lookup value)
Industry	Drop Down (BlueCamroo lookup value)
Sector	Drop Down (BlueCamroo lookup value)
<b>Price Book</b>	Drop Down (BlueCamroo lookup value)
Source	Drop Down (BlueCamroo lookup value)
Language	Drop Down (BlueCamroo lookup value)
Time Zone	Drop Down (BlueCamroo lookup value)
<b>EMAIL</b>	<b>RECORD TYPE</b>
Email	Normal
In Mailing List	Drop Down (BlueCamroo lookup value)

ADDRESS	RECORD TYPE
Street	Normal
Street 2	Normal
Street 3	Normal
City	Normal
State	Drop Down (for United States, Canada, United Kingdom, and Australia) or Normal (by default for others)
Zip	Normal
Country	Drop Down
Home Phone	Normal
Personal Mobile	Normal
Home Fax	Normal
PERSON SOCIAL NETWORK	RECORD TYPE
Facebook	Normal
Linkedin	Normal
Twitter	Normal

Note: fields in red are required.

4. Go!

OK, so you've got a nice clean list. You're good to go!

Open the **Main Navigation Panel** and click the **Import**  icon.

The first step of the import asks you to indicate what type of data you are importing:

**Organization and Contact:** Select if you have a mix of organization and person data (some being contacts, some being single person leads/suppliers/customers).

**Contact Only:** Select if you already have organizations entered into BlueCamroo but you need to import human contact information for these organizations.

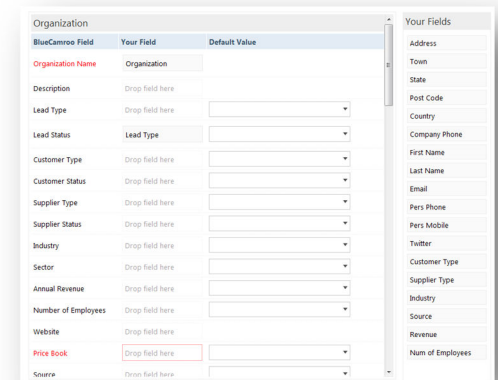
**Organization Only:** Select if you are only trying to import organizations (for example, customers that are companies or leads that are only known to you as

companies) but you have no person data to import. For example, your organizations or leads *have no associated human contacts*.

**Person Only:** Select if you are only trying to import people records (for example human suppliers, leads you only know by a human name, or customers that work under their own name).

Now pick the file that has your data (and the individual sheet, if you're importing from a multi-sheet Excel workbook), and map the relevant fields that you want to load.

Click Next! Now the fun begins. On the right you will see drag-and-drop headers. When you import your file, BlueCamroo reads the column headers and then presents them as draggable. Simply drag what column of data should go into the target fields. If you have any left, you know you've not matched up all your importable data.



Note that BlueCamroo allows you to pick Default values for any Lookup Data not included in your input file. For example, in the screenshot below, all imported records are going to be marked In Mailing List = 'True'.

When you've mapped all the fields, start the import!

5. Ready to commit?

The third screen in the import lets you know if the import went successfully or if there were errors (rejected records). If things seemed to go really badly, rest assured nothing gets actually added to your database until you click the commit button. You have two options. Click the **Previous** button and retry your mappings. Or click the **Home** button at the top of the page and abandon the whole process. You might need to refine your import file. Consult step 2 and 3 above ("Clean your

data", "Check coding data") for a checklist on how to get your import file into the proper format.


### ***Oh! You've got rejected records...***

This is pretty normal when you have data about more than one contact at some of the companies you do business with. BlueCamroo will load the company ("Organization") data the first time it comes across it, then reject all the next rows for the same company that it comes across. That's perfectly correct, and nothing to worry about.

#### 6. If you decide to try again...

Suppose you've done your first import and things seemed to have gone well but as you explore your new data you can see a few things you'd like to have done differently. So you delete your data from BlueCamroo, update your file, and try again...

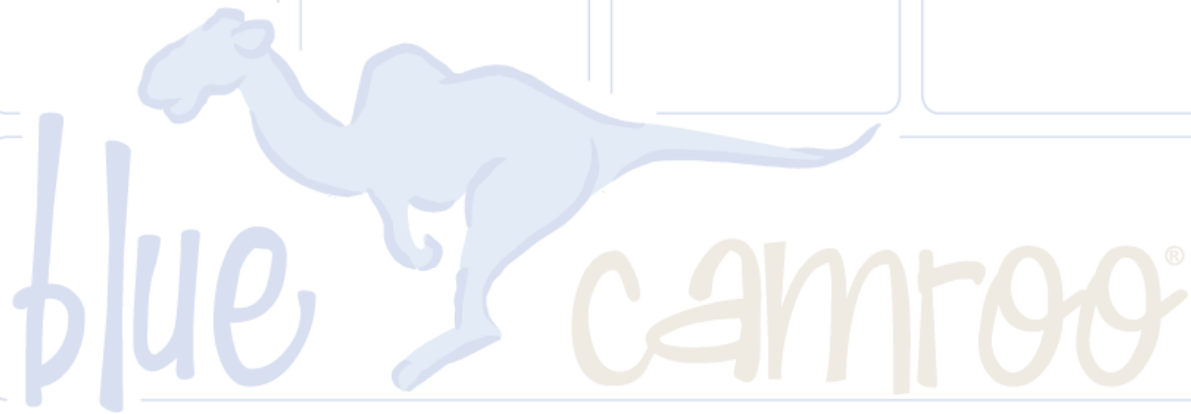
...and BlueCamroo rejects everything!

Don't panic! BlueCamroo is very strict about preventing duplicate data. What has happened is the data you loaded before is still in the system, sitting in the Recycle Bin. Because you might 'undelete' this data in the future, BlueCamroo won't let you load new data that duplicates it. Just open the **System Navigation Panel** and access the  **Recycle Bin**, permanently delete the old records, and try your import again.

### **What to Do if Bad Things Happen**

If you've followed the steps above and you're still struggling to load your data, please don't give up. Transforming and loading data is one of the most tricky parts of migrating to any new CRM system. Just email a copy of your data file to [support@bluecamroo.com](mailto:support@bluecamroo.com) and one of our technicians will be glad to check your data and identify any remaining issues that are stopping it from loading.

***We're here to help!***



Do More with BlueCamroo