

Database Reformatting Guidelines

By completing the following steps, you will ensure you are importing clean data into your CRM system to maximise the opportunity of profiting from your database.

- a) Use the provided database template and populate as many of the columns as possible.
 - b) Collate all your company wide contact data into this master spreadsheet e.g. email contacts, staff email contacts, accounting software, order forms.
 - c) Ensure the address fields are separated into individual columns (e.g. street, suburb, city) to make segmenting your data by location easier for marketing purposes.
 - d) Remove or merge any duplicate entries to ensure you have complete records for your contacts where possible. FYI Zoho will capture any entries with duplicate email addresses during the data import.
- FYI** Once your new CRM system is live, you will be able to easily upload all of your collected **business cards** to the system by using the Zoho card scanning app.
- This process involves simply taking a photo of your cards, the app will extract all of the relevant contact information and allow you to upload the contact directly to your Zoho CRM account.