

Introduction to PeopleImport

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

For example when returning from a large tradeshow with a list of a couple hundred attendees, how do they get loaded into salesforce.com? Are some of them already in the system? Won't importing create duplicates?

PeopleImport has been designed to solve these issues.

PeopleImport - Product Overview

PeopleImport has been designed to be the professional AND cost effective way to import Leads, Accounts and Contacts into salesforce.com.

PeopleImport is a standalone Windows application available to any salesforce.com

Professional or Enterprise customer, administrators and non-administrators alike. 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 to a single operation.

PeopleImport brings the following new capabilities to salesforce clients:

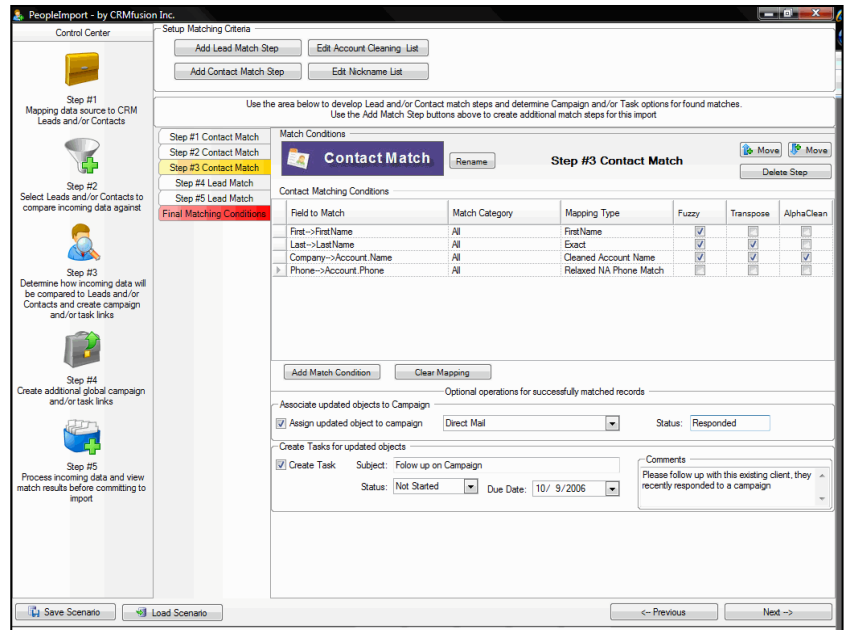
- Ability to import records in a single pass, effecting Leads, Contacts and Accounts. PeopleImport will add if new, update if existing, and ensure that duplicates are not created!
- At the same time create all the required Events and Tasks to properly record the post import activities. In addition, records can also be connected to Campaigns
- Administrator's set-up import scenarios and then distribute to other users, maintaining control on how data is imported

PeopleImport Pricing

PeopleImport is sold on a per user per year basis. Each PeopleImport users pays \$995 per year for PeopleImport with the price including upgrades and support. Please contact sales@crmfusion.com for more information or visit our website at www.crmfusion.com.

Interested in Learning More?

Please visit www.peopleimport or www.crmfusion for more information.

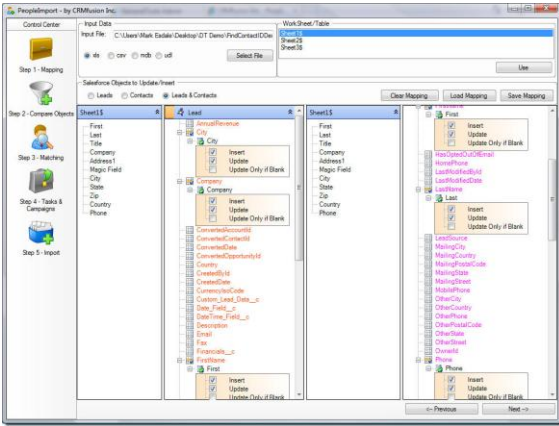


PeopleImport allows for 100% customized deduplication of incoming data. Stop duplicates ... update the records you already have.

The PeopleImport Process

PeopleImport Screen #1 – Define Mappings

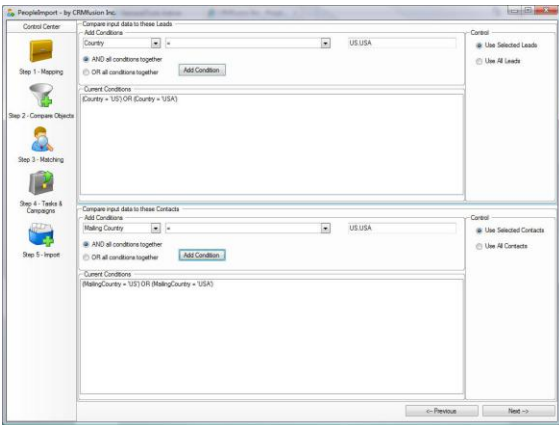
Because PeopleImport has the ability to import into both Leads and Contacts at the same time the incoming data source (XLS, MDB, CSV or Queue) can be mapped to the Contact and/or to the Lead table. Most customers would map to both Leads and Contacts, in addition to the mapping you also set the mapping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



People Import Screen #2 – Deciding what to Compare To

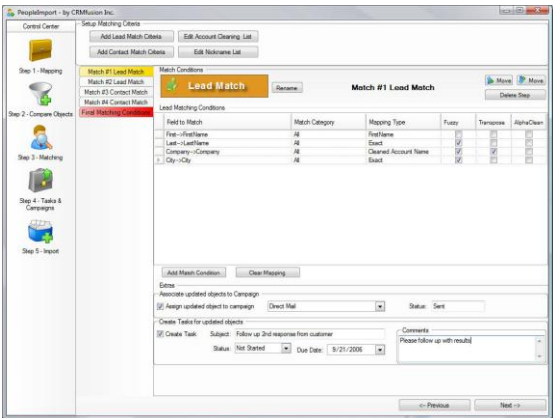
Deciding which Leads and which Contacts the incoming data should be compared against.

To support the largest of customers PeopleImport allows you to decide which Leads and which Contacts the incoming data will be compared against. Geographic or regional narrowing is expected to be common place.



People Import Screen #3 and #4 – Deciding what to Compare To

Deciding which Leads and which Contacts the incoming data should be compared against. PeopleImport allows you to decide which Leads and which Contacts the incoming data will be compared against. At the same time determine the Campaign linkages, Tasks and Events to be created at each matching step.



People Import 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.

