



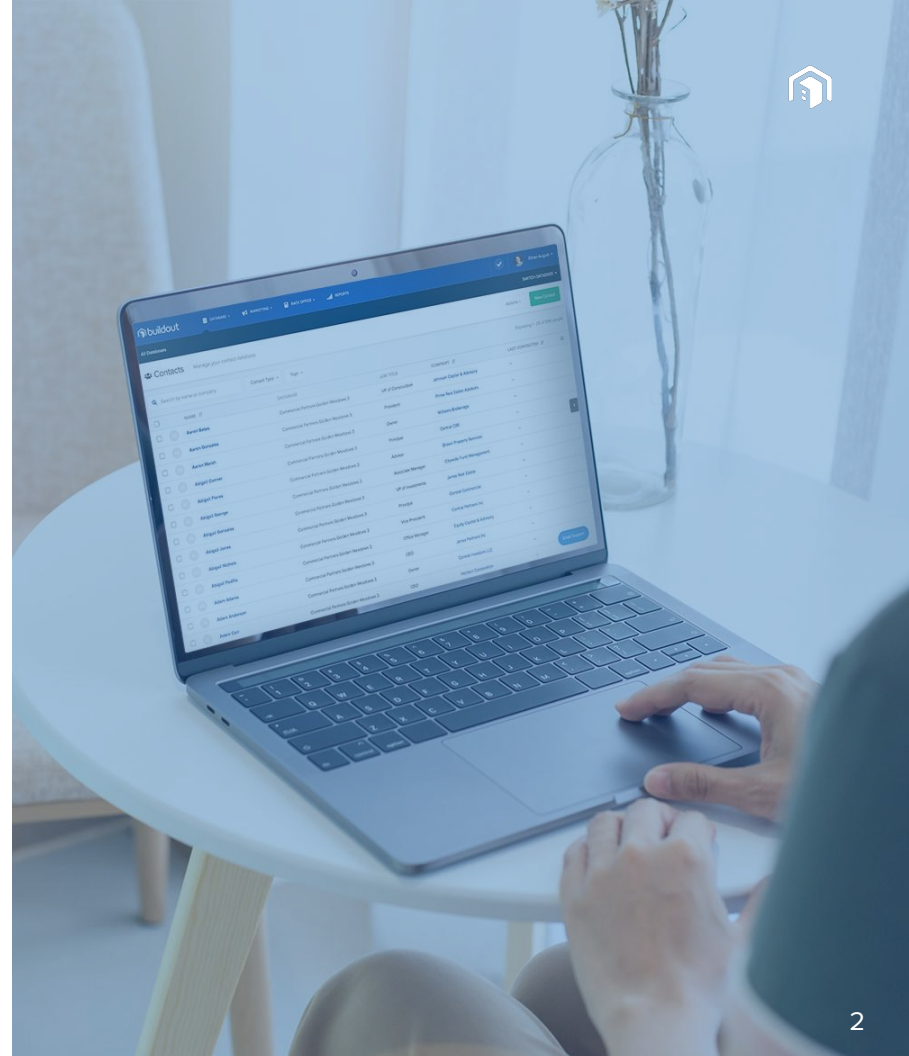
# Lite CRM import process map

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# How to get your data into Buildout

We've created this deck for you to use as a resource to follow you through your import process—including the tasks in your court and tips for knocking them out of the park.



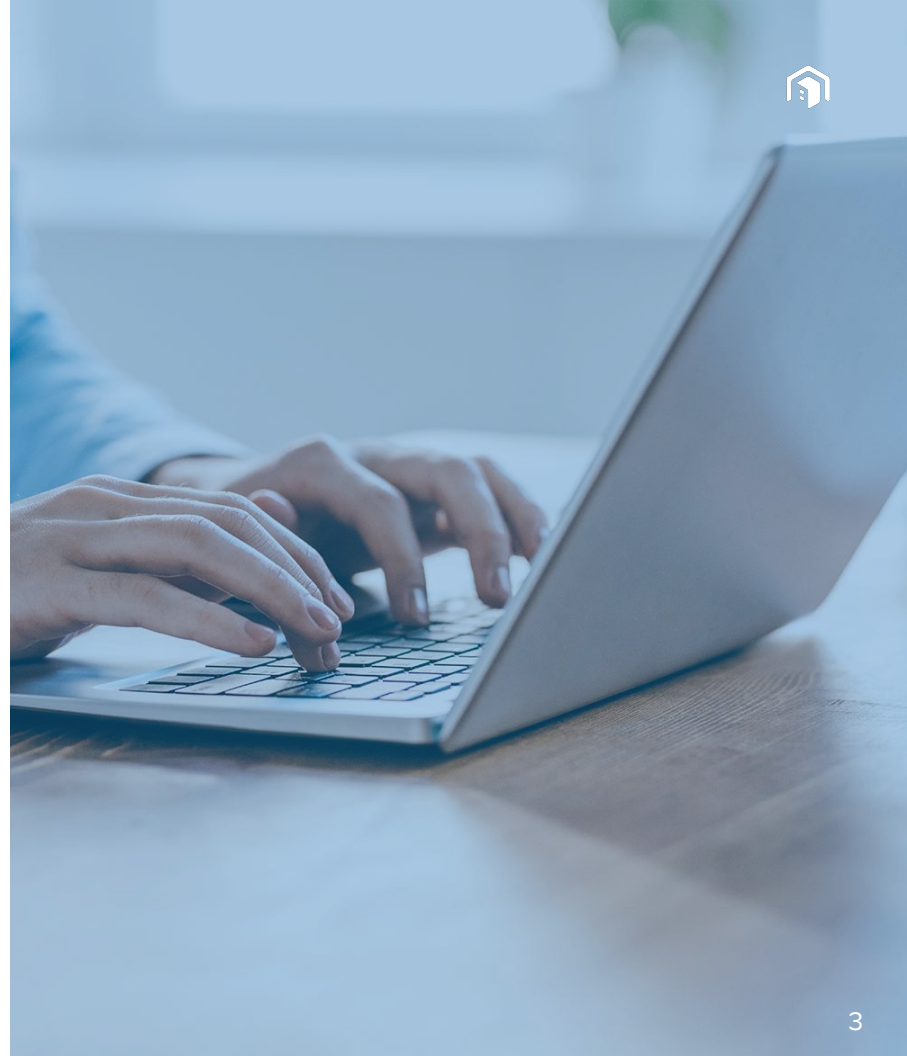


Your action items for a successful import

- ▶ **Export your brokerage's current CRM data**
- ▶ **Review your exported data to avoid errors**
- ▶ **Upload your data to Buildout for import**

What to expect post-import

- ▶ **Working with your Data Analyst**
- ▶ **Delivery confirmation and skipped data review**
- ▶ **Verifying your data in Buildout**





# Your action items for a successful import



# Export your brokerage's current CRM data

Your first step is to pull your existing data into a format we can import: either CSV (.csv) or XLS (.xls). Here are the sources we have experience helping customers with:

- ▶ **Apto**
- ▶ Buildout template
- ▶ **ClientLook**
- ▶ **Compstak**
- ▶ **Excel**
- ▶ **Google Sheets**
- ▶ **Highrise**
- ▶ **Insightly**
- ▶ **Outlook**
- ▶ Prospect Now
- ▶ **REA**
- ▶ **RealNex**
- ▶ **Reonomy**
- ▶ **Salesforce**

Each link on this list leads to resources (where available) on how to get your data into CSV or XLS formats.



# Review your exported data

Complete a thorough review of your exported data to ensure everything will be imported correctly and meet your needs once fully set up in Buildout.

We've identified some common formatting things to look out for during your review of

- ▶ Contacts
- ▶ Companies
- ▶ Properties
- ▶ Comps



# Tips for reviewing your contact data

- ▶ **Make sure all rows contain either First Name, Last Name or Email Address.** Contacts will not be created in Buildout if their row in your export doesn't contain at least one of these elements.
- ▶ **Check that periods and/or middle initials are used consistently across your data.** If not, and the rows are left as-is in your export, duplicate contact records may be created within your database.
- ▶ **Example:** This formatting could cause three separate records to be created.

First Name	Middle Initial	Last Name
John M.		Smith
John	M	Smith
John	M.	Smith



# Tips for reviewing your company data

- ▶ **Make sure all rows contain Company Name or Entity Name.** Company records will not be created in Buildout if their row in your export doesn't contain at least one of these elements.
- ▶ **Verify each Franchise in your data has a unique Company Name, like “McDonalds - State St” and “McDonals - Grand Ave”.** Our importer skips rows with the same name to avoid duplicate records.
- ▶ **Check that company names are structured consistently across your data.** If not, and the rows are left as-is in your export, duplicate company records may be created within your database.
- ▶ **Example:** These formatting differences could cause three separate records to be created.

“Office CRE” vs “Office CRE Inc.” vs “Office CRE Ltd.”





# Tips for reviewing your property data

- ▶ **Make sure all rows have Address, City, State, and Zip Code stored in separate columns.** If any of these elements are combined within a cell, the record will fail during the import process.
- ▶ **Check that cardinal directions and road labels are used consistently across your data.** If not, and the rows are left as-is in your export, duplicate records may be created within your database.
- ▶ **Example:** These formatting differences in Address data could cause duplicate records.

Address	City	State	Zip
111 South State Street	Chicago	IL	60606
111 S. State Street	Chicago	IL	60606
111 South State St	Chicago	IL	60606
111 South State Street	Chicago, IL		60606



# Tips for reviewing your comparables data

- ▶ **Make sure all rows contain the Address, City, State, and Zip Code of the property the comps are linked to.** If any of these elements are combined within a cell, the record will fail during the import process.
- ▶ **Example:** This formatting could cause multiple records to be created.

Address	City	State	Zip
222 S Riverside Plz	Chicago	IL	60606
222 S Riverside Plz	Chicago, IL		60606

- ▶ **For your Sale comps:** Check that Close Date and Price are both in the same row as the property information.
- ▶ **For your Lease comps:** Check that Tenant, Lease Expiration Date, and Suite are all in the same row as the property information.



# Upload your data to Buildout for import

- ▶ After you've finished the review of your exported data to prevent import errors, upload your files to the **Buildout Import Google Form**.
- ▶ **Upload your finalized data**



# What to expect post-import



# Working with your Data Team

Once your Data Team receives your imported files, they'll begin validating your data.

If your data requires advanced manipulation to successfully run through our importer, your Data Team may reach out via email to communicate questions or additional requirements.

You can learn more about our Data Team's process in this [\*\*Buildout Help Center article\*\*](#).



# Delivery confirmation and skipped data review

Be on the lookout for an email from Buildout confirming your data was successfully imported.

There may be some rows from your data that failed or were skipped during your import. If this is the case, we'll provide a CSV file of any of these skipped rows for you to review and fix before we attempt to import again.



# Verifying your data in Buildout

Log into Buildout to review your imported data in your Database and make sure it meets your needs.

Check your contact, company, property, and/or comp records and—if applicable—review associations between your records.

If you notice anything that looks wrong, reply directly to your delivery email to let us know!