

IMPORT POST PROCESS MANAGEMENT FOR CRM

SABARESHWARAN M
Department of Electronics and
Instrumentation Engineering
Bannari amman institute of technology
Sathyamangalam
sabareshwaran.ei19@bitsathy.ac.in

SANTHIYAR
Department of Information technology
Bannari amman institute of technology
Sathyamangalam
santhiya.it19@bitsathy.ac.in

SELVADHARANI K
Department of Information technology
Bannari amman institute of technology
Sathyamangalam
selvadharani.it19@bitsathy.ac.in

Abstract—The global business community needs an effective, digitalized, user friendly and customizable softwares to move their own business processes further wider and lightly. It also should cover the various business stages and processes. For that, engaging the customers with an honored structure of scale in the association, having over the control on their client related conditioning are largely demanded. To help the business people in that regard, the Customer Relationship Management comes into actuality. various companies have different nominated CRM for different purposes. For those wide kinds, some features are being common. One of those points is Import. Then, we're proposed the processes that are available and demanded after completing an import and the interior procedures and perceptivity regarding import. It also delicately explains the need and advantages over the Import feature present in CRM.

Keywords—engaging customers, demanded technology Import, interior procedure.s

I. INTRODUCTION

The definition of customer relationship management (CRM) varies depending on the goal that the person is trying to attain. Identifying,comprehending, managing, and attending to the business needs of potential and current clients is a strategy for some. Others see it as a

system that:1.Aids in gathering all the data necessary to present a comprehensive 2.picture of customers' interests and preferences.3.offers a range of alternatives for controlling the sales and marketing processes as well as for routinely interacting and engaging with customers.An CRM system aids a business in fortifying and developing enduring relationships with its clients in both of these ways.

A powerful CRM system may make managing every part of the business easier. It should have no trouble comprehending the business, connecting it with both customers and employees, and capturing business data so that a complete picture of each customer can be obtained in real time.A multifaceted CRM system that offers the following would be ideal:

- 1.continuous access to client information
- 2.Boost departmental cooperation
- 3.Streamline various procedures
- 4.actively engage in the journey of the consumer
- 5.Make sensible choices.

II. LITERATURE SURVEY

As part of the literature review, the many research papers are examined. This study's main focus is on: 1. Gaining a better understanding of the import process 2. To be aware of the testing types that can be used to help reduce risks during data import. 3. To learn

about problems with data consistency and quality, as well as how to fix these errors. 4. To be aware of current tools and methods for testing the data validation process.

The Researched Papers Below Really Aid In Gaining More And More Detailed Knowledge Of import Process:

[1] Chua et al explains an overview of the literature on data integration for CRM systems and discusses the challenges and benefits of integrating data into a CRM system.

[2] Priyanka Meena explains the classification within primary studies based on data collection tools used, sampling technique used, sampling country, industry, statistical tests and methods and software used.

[3] Wang et al explores the challenges of data import in CRM systems, including data quality, data mapping, and data cleansing, and provides recommendations for overcoming these challenges.

[4] Gurbuz et al discusses the data quality challenges in CRM systems, including data completeness, accuracy, and consistency, and provides solutions for ensuring the quality of data in a CRM system.

[5] Yin et al compares different data import methods for CRM systems, including manual import, import through APIs, and import using third-party tools, and evaluates their strengths and limitations.

[6] Vicente Guerola-Navarro CRM has helped drive growth and future expectations and has had excellent results in terms of return on investment wherever it has been implemented. In a structured manner, the present paper reviews the 86 most relevant studies of how CRM affects entrepreneurial marketing policy development through its alignment with relationship marketing and customer-centric business models. The growing use of CRM in companies is one of the pillars of technological and social change in entrepreneurship, being a clear example of how big data can benefit society.

III. THEORETICAL STUDY OF DATA IMPORT

3.1 A. Introduction to Data Import

The CRM Data import tool helps you minimise manual work while ensuring that your data is accurately migrated. Import file columns are immediately mapped to CRM fields and import file files to CRM modules. When modules are not already present, CRM creates them and associates the pertinent files with them. It makes it very evident how many files are mapped, how many are unmapped, and how many are not supported.

B. Overview of Data Import

The CRM Data import tool helps you minimise manual work while ensuring that your data is accurately migrated. Import file columns are immediately mapped to CRM fields and import file files to CRM modules. When modules are not already present, CRM creates them and associates the pertinent files with them. It makes it very evident how many files are mapped, how many are unmapped, and how many are not supported. General overview of the import procedure before migrating other format files. The files should be in CSV format. A file can only be up to 8 GB in size. There is a 200 file cap on the total amount of files you can move at once. You can upload a ZIP file, and it should be organised as follows: When the ZIP file is opened, all of its contents should be CSV files. The ZIP file system will generate an error during file insertion if there are any folders present. Based on the file names in CRM, the majority of Standard modules will automatically become associated with the system.

C. Data from Source CRM

Customers data from other CRM will be in other formats like in .sql in one type of CRM and .bak in another CRM. But some CRMs will only accept the files in CSV format. During import, uploading other format files like .sql and .bak takes more time. When we convert the data from .sql and .bak files to .csv files, the size of the data becomes reduced and hence the time taken for the uploading and processing will be reduced.

D. Need For CSV

A CSV file, which stands for "comma-separated values," is essentially a text file with data in it that is often taken from a database and is separated by commas. Although a CSV file is far more laborious to read than an Excel sheet, you might still be able to grasp it if you open it in a text editor like Notepad. Although CSV files are not used directly, they are crucial to the operation of databases all across the world. Due to its straightforward format, portability, and enormous data carrying capacities, CSV will be supported by any database management software. With all of this, CSV becomes a global language for transferring data between databases. Even though CSVs are fantastic, their major drawback is they are challenging for the average user to read. Instead of using a text editor, one should use specialised programmes to convert, format, or validate your CSV files.

E. Data Mapping

The most challenging step in CRM data import efforts is data mapping. Remember that you need to move all entities entirely into the new platform. Data mapping is the process of matching fields from one database to another. It's the first step to facilitate data import, data integration, and other data management tasks. Before data can be analyzed for business insights, it must be homogenized in a way that makes it accessible to decision makers. Data now comes from many sources, and each source can define similar data points in different ways. For example, the state field in a source system may show Illinois as "Illinois," but the destination may store it as "IL."

Data mapping bridges the differences between two systems, or data models, so that when data is moved from a source, it is accurate and usable at the destination. Data mapping has been a common business function for some time, but as the amount of data and sources increase, the process of data mapping has become more complex, requiring automated tools to make it feasible for large data sets.

IV. METHODOLOGIES IN DATA IMPORT

A. Need for import process

The hidden and output layer neurons possess activation function but input layer neurons don't. Activation functions perform a transformation on the input received in order to keep values in manageable range. The import process in Customer Relationship Management (CRM) systems has been an important aspect of managing customer data since the earliest days of CRM technology. The ability to import data into a CRM system has always been crucial for organizations to maintain a centralized repository of customer information, reduce manual data entry, and improve data accuracy. Over time, the import process in CRM systems has evolved, with new technologies and methods being developed to make the process more efficient, reliable, and secure.

For example, advances in data mapping, data integration, and data quality technologies have made it possible to import data from a variety of sources, including spreadsheets, databases, and other CRM systems, with greater accuracy and speed. Today, the import process in CRM systems continues to be an important part of managing customer data, and organizations are increasingly relying on CRM systems to support their business operations and customer engagement initiatives. Whether importing data from legacy systems, integrating data from other sources, or updating customer information, the importance of the import process in CRM continues to grow.

B. Preparing data for import

Preparing the data for import into a CRM system is an important step in the process, as it helps to ensure the accuracy and consistency of the data once it has been imported. The following are some best practices for preparing data for import into a CRM system:

Clean the data: Remove any duplicate records, incomplete or outdated information, and ensure that all data is consistent and accurate.

Organize the data: Ensure that the data is organized into fields that are relevant to the CRM system, and that the data is in the correct format (e.g., date, number, text, etc.).
Map the fields: Determine how the fields in the data will map to the fields in the CRM system. This will help you to ensure that the data is imported into the correct fields and is organized in a way that makes sense for the CRM.
Verify the data: Run a thorough check of the data to ensure that it is accurate, complete, and consistent.
Consider using a data verification tool to automate this process.

Save the data in a compatible format: Most CRM systems accept data in formats such as CSV, Excel, or XML. Make sure that the data is saved in a format that is compatible with the CRM system you are using.

C.Data Management for import in CRM

Managing the imported data in a Customer Relationship Management (CRM) system is critical for ensuring that the data is accurate, complete, and up-to-date. Here are some best practices for managing the imported data in a CRM system:

Data quality management: Implement data quality checks and validation rules to ensure that the imported data is accurate, complete, and consistent.
Data mapping: Map the imported data to the appropriate fields in the CRM system to ensure that the data is correctly aligned and stored in the correct format.

Data normalization: Normalize the imported data to ensure that it conforms to a standard format, making it easier to search, retrieve, and analyze.
Data integration: Integrate the imported data with other data sources, such as marketing automation systems, to provide a complete view of the customer.

Data security: Ensure that the imported data is protected and secure, in accordance with data privacy regulations and best practices.
Data backup: Regularly back up the imported data to ensure that it can be recovered in the event of a disaster.

4.4 D.Rollback the imported records

Rolling back the imported data in a Customer Relationship Management (CRM) system is a process of undoing a previously completed import, effectively removing the imported data from the system. Here are the steps to roll back an import in a CRM system:

Identify the import: Determine the specific import that needs to be rolled back, including the date, time, and source of the import.
Restore a backup: If a backup of the CRM system was taken prior to the import, restore the backup to undo the changes made by the import.

Manually remove the data: If a backup is not available, the imported data can be manually removed from the CRM system, either by deleting individual records or by using a data deletion tool.
Re-import the data: After the imported data has been removed, the data can be re-imported into the CRM system, either from the original source or from a corrected version of the data.

Rolling back an import in a CRM system is typically done when the imported data is found to be incorrect, inconsistent, or otherwise problematic. By rolling back the import, organizations can maintain the accuracy and completeness of the data in their CRM system, and avoid any negative impacts on their business operations and customer engagement initiatives.

4.5 E.Skipped Imported records

In a Customer Relationship Management (CRM) system, skipped imported records are records that were not processed or imported into the system during a data import operation. To identify the skipped imported records in a CRM system and the reasons for skipping, follow these steps:

Check the import log: The import log in the CRM system should show the number of records imported and the number of records skipped during the import operation.

Review the error messages: The CRM system may provide error messages indicating why specific records were skipped during the import. These messages can

provide insight into the reasons for the skipped records, such as missing data, invalid data format, or data constraints.

Analyze the data: Analyze the data in the skipped records to identify any patterns or trends in the data that may have caused the records to be skipped. For example, if multiple records with the same address were skipped, the address field may have a maximum length constraint. **Fix the data:** Based on the analysis, correct the data in the skipped records to ensure that it meets the requirements of the CRM system, and re-import the data.

By identifying the skipped imported records and the reasons for skipping, organizations can improve the accuracy and completeness of the data in their CRM system, and avoid any negative impacts on their business operations and customer engagement initiatives.

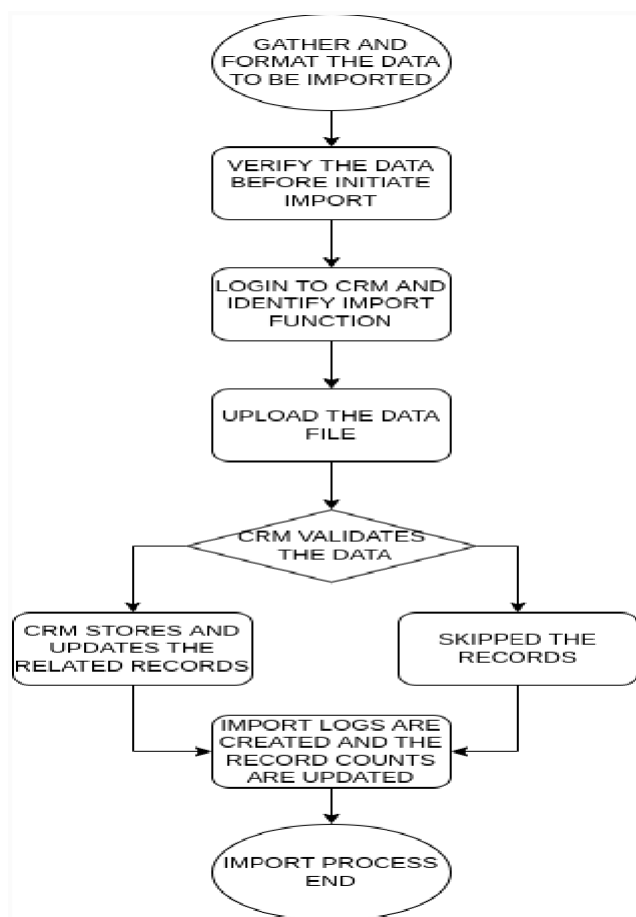


Fig.1 Flow Of Import Process In Crm

V.CONCLUSION

The import process in a Customer Relationship Management (CRM) system is a crucial aspect of managing and maintaining customer data. The import process allows organizations to bring in large amounts of data from external sources into the CRM system, helping to ensure the accuracy and completeness of the data. By following a well-defined import process, organizations can import data into their CRM system with confidence, knowing that the data will be properly validated and formatted before it is stored in the system. Additionally, the import log generated by the CRM system provides valuable information about the import operation, including the number of records imported and the number of records skipped, helping organizations to identify and resolve any data issues. Overall, the import process is a key component of effective CRM data management, and a well-designed import process can help organizations to improve the quality of their customer data and better serve their customers.

VI. REFERENCE

[1] Data Integration for Customer Relationship Management Systems : A Review of the literature.(2010) by Chua et-al.

[2] Customer Relationship Management Research from 2000 to 2020: An Academic Literature Review and Classification. Priyanka Meena - Central University of Rajasthan

[3] Challenges and approaches in data migration to customer relationship management systems. (2013) by Wang et-al.

[4] Data quality challenges and solutions in customer relationship management systems. (2017) by Gurbuz et al.

[5] A comparative study of data import methods for customer relationship management systems.(2018) by Yin et al

[6] Customer relationship management and its impact on entrepreneurial marketing. Vicente Guerola - Navarro International Entrepreneurship and Management Journal (2022)

[7]Data Migration in Customer Relationship Management Systems: A Review of Literature.(2020) by H. M. Thakur, Journal of Data Management and Analytics

[8]Data Integration in Customer Relationship Management Systems: A Study of Practice. (2015) by R. Al-Gahtani, Journal of Enterprise Information Management.

[9] An Exploratory Study of Customer Relationship Management System Implementation. (2010) by P. H. Werth, Journal of Business and Management.

[10] Importance of Data Quality in Customer Relationship Management. (2008) by C. Kim, Journal of Data Management and Analytics.