

SmartPublisher™ Data Import FAQ

Transitions to SmartPublisher that include importing data from other sources should be aware of the following critical pieces of information. Use these answers to common questions to identify the steps to a successful data import.

What can be imported into SmartPublisher?

- Accounts
- Contacts
- Balance forward information
- Contact Relationship Management notes

Is data import included in the price of SmartPublisher?

- No. Data import is charged separately at the current hourly rate.

How do we get ready?

- Clean up the data you wish to import in your existing system. Standardize address information, eliminate duplicate accounts, verify and correct all account balances, etc.
- Apply all outstanding credits

How do we import data from more than one source?

- If you have a contact management system and an accounting system(s), Pre1 can import both.
- Be sure there is a unique ID in common across all sources.
- Merge duplicate accounts; we don't do it during import.
- Use the fewest possible data sources – importing multiple customer lists causes significant duplication.

What will NOT be imported into SmartPublisher™?

- Ads
- Ad schedules
- Historical financial detail
- Historical notes

Does Pre1 export the data from our old system for us?

- No. It is your responsibility to get Pre1 the data the format provided in the SmartPublisher Import Templates.

How do we get the data to Pre1?

- Export the data from your legacy system. Convert it to the form provided in the Import Templates.
- FTP the information to Pre1 by way of the user name and password that Pre1 will provide.

When do we “go live” with SmartPublisher?

- Going live with SmartPublisher should coincide with your SmartPublisher training. At that time, SmartPublisher will become your exclusive front-end system. Importation of your data should be coordinated to correspond with your training.

How long until the data import is complete?

- Data import is usually completed within one to two business days after the receipt of your final data.

Do I need to double enter data into SmartPublisher and my old system?

- No. Pre1 has imported data successfully for hundreds of customers. Double entry results in unhappy, overworked users who are prone to make mistakes. Mistakes give the illusion of inconsistencies between the programs. Those apparent inconsistencies cause more work, distracting further from the goal of successfully transitioning to a superior product and using that product to make more money.

How will our data look in SP?

- Accounts – The accounts provided in the export will transfer to SmartPublisher. The old account IDs will be stored on the account if provided, but the primary account ID will be created by SmartPublisher.
- Contacts – Any contact for an account can be imported with basic information for that person.
- Invoices – Pre1 imports balance forward information. An aging report can be used to create the open accounts receivable information from the existing system. Each aging column will be represented by a single invoice for that period.
- Credits – All credits should be applied before providing an export of data to Pre1. However, if account credit information is present in the export provided, that credit will appear in SmartPublisher as single number, reflecting the current account credit.