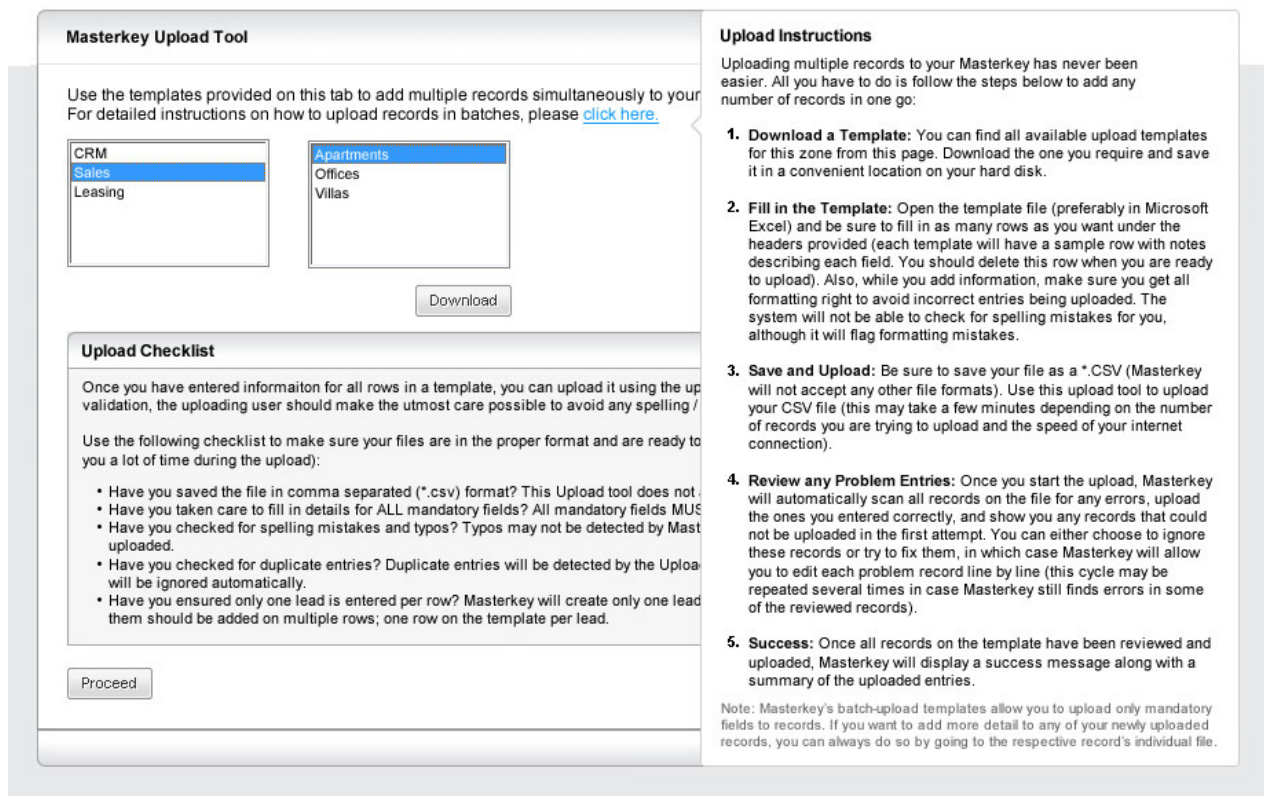


Introduction to the Masterkey Batch-Upload Tool

Masterkey's batch upload tool allows users to download pre-prepared data templates from the Masterkey application onto their computer's hard disk for easy access. Equipped with an intuitively organized data template, users are able to quickly and efficiently compile their data offline and then upload their files to Masterkey in one single action. Essentially this gives you the freedom to add multiple contacts and/or units simultaneously, eliminating the tedious task of adding each record separately.



Masterkey Upload Tool

Use the templates provided on this tab to add multiple records simultaneously to your Masterkey application. For detailed instructions on how to upload records in batches, please [click here](#).

CRM Sales Leasing	Apartments Offices Villas
--------------------------------	--

Download

Upload Checklist

Once you have entered information for all rows in a template, you can upload it using the upload tool. During the uploading process, the uploading user should make the utmost care possible to avoid any spelling / formatting mistakes (this may take a few minutes depending on the number of records you are trying to upload and the speed of your internet connection).

Use the following checklist to make sure your files are in the proper format and are ready to upload (this may save you a lot of time during the upload):

- Have you saved the file in comma separated (*.csv) format? This Upload tool does not accept any other file formats.
- Have you taken care to fill in details for ALL mandatory fields? All mandatory fields MUST be filled in.
- Have you checked for spelling mistakes and typos? Typos may not be detected by Masterkey.
- Have you checked for duplicate entries? Duplicate entries will be detected by the Upload tool and will be ignored automatically.
- Have you ensured only one lead is entered per row? Masterkey will create only one lead per row. Multiple leads should be added on multiple rows; one row on the template per lead.

Proceed

Upload Instructions

Uploading multiple records to your Masterkey has never been easier. All you have to do is follow the steps below to add any number of records in one go:

- 1. Download a Template:** You can find all available upload templates for this zone from this page. Download the one you require and save it in a convenient location on your hard disk.
- 2. Fill in the Template:** Open the template file (preferably in Microsoft Excel) and be sure to fill in as many rows as you want under the headers provided (each template will have a sample row with notes describing each field. You should delete this row when you are ready to upload). Also, while you add information, make sure you get all formatting right to avoid incorrect entries being uploaded. The system will not be able to check for spelling mistakes for you, although it will flag formatting mistakes.
- 3. Save and Upload:** Be sure to save your file as a *.CSV (Masterkey will not accept any other file formats). Use this upload tool to upload your CSV file (this may take a few minutes depending on the number of records you are trying to upload and the speed of your internet connection).
- 4. Review any Problem Entries:** Once you start the upload, Masterkey will automatically scan all records on the file for any errors, upload the ones you entered correctly, and show you any records that could not be uploaded in the first attempt. You can either choose to ignore these records or try to fix them, in which case Masterkey will allow you to edit each problem record line by line (this cycle may be repeated several times in case Masterkey still finds errors in some of the reviewed records).
- 5. Success:** Once all records on the template have been reviewed and uploaded, Masterkey will display a success message along with a summary of the uploaded entries.

Note: Masterkey's batch-upload templates allow you to upload only mandatory fields to records. If you want to add more detail to any of your newly uploaded records, you can always do so by going to the respective record's individual file.

Figure 1: Batch Upload checklist and instructions screen.

A unique feature of the upload tool is its ability to screen each record as it is uploaded, add the correct records immediately, and present any records with errors or incomplete information for correction during the upload process in an extremely intuitive and user-friendly manner.



Masterkey Upload Tool

Upload Notes:
 21 records have been uploaded successfully
 5 duplicate records were automatically ignored
 1 record was deleted by the user
 2 records have errors in them, Please correct the highlighted items below and click submit.

Select a file to upload:

Salutation	First Name	Family Name	Mobile	Work Phone	Home Phone	Fax	Main Contact
<input type="checkbox"/> Mr.	Simon	Westmorland	055 910 4949	055 910 4949	055 910 4949	055 910 4949	055 910 4949
<input type="checkbox"/> Mr.	Blake	Norris	055 910 4949	055 910 4949	055 910 4949	055 910 4949	055 910 4949
<input type="checkbox"/> Mr.	David	Wainwright	055 910 4949	055 910 4949	055 910 4949	055 910 4949	055 910 4949
<input type="checkbox"/> Mr.	Sinbad	Peterson	055 910 4949	055 910 4949	055 910 4949	055 910 4949	055 910 4949

Figure 2: Making corrections during the upload process.

The following table lists the basic functional aspects of the upload process:

Item	Supported for	Uploaded in	Pre-requisite for Upload	Max records
Contacts	<ul style="list-style-type: none"> Individuals Companies 	Prospects	None	5000
Units	<ul style="list-style-type: none"> Apartments Villas Offices 	Available Units ¹	<ul style="list-style-type: none"> Owner contact must exist Associated property must exist 	5000

¹ Newly added units will be uploaded as available units when draft functionality is disabled. For companies whose draft functionality is enabled, newly uploaded units will be stored as draft units.