

Before You Begin: Important Notes

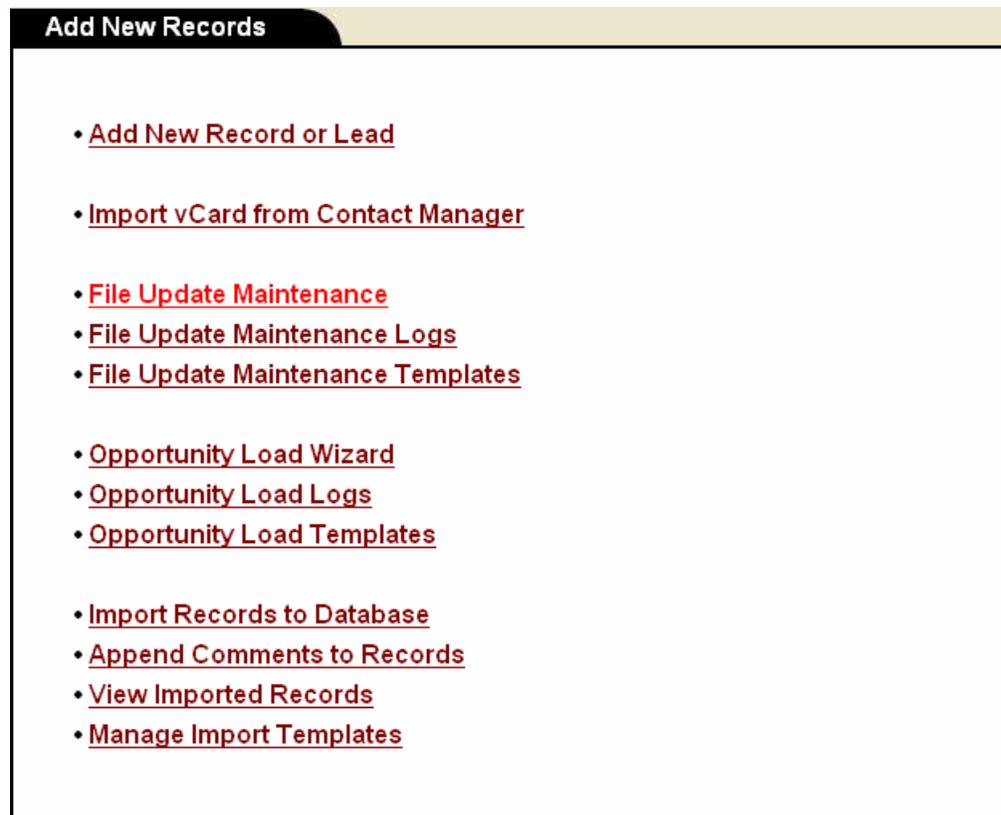
The File Update Maintenance module is control by the Logon Advanced Privilege called File Update Maintenance that **can only be activated by LeadMaster personnel**.

NOTES:

- This module is a very powerful tool but its results are permanent since there is no way to back out the changes (like you can with the Import module). Therefore, this feature must be used with extreme caution and anyone using this module needs to fully understand how it works and do sample testing before using it to update their live DB.
- This feature only updates basic leaddb fields and the primary contact information. It does not enable any updates of secondary contact information or custom form data.

The File Update Maintenance Process

Chose **File Update Maintenance** from the **Add New Records** screen (privilege has to be active for user)



Add New Records

- [Add New Record or Lead](#)
- [Import vCard from Contact Manager](#)
- **[File Update Maintenance](#)**
- [File Update Maintenance Logs](#)
- [File Update Maintenance Templates](#)
- [Opportunity Load Wizard](#)
- [Opportunity Load Logs](#)
- [Opportunity Load Templates](#)
- [Import Records to Database](#)
- [Append Comments to Records](#)
- [View Imported Records](#)
- [Manage Import Templates](#)

Then choose the workgroup to be updated:

The screenshot shows a dialog box titled "File Update Maintenance - Choose a Workgroup". The main text reads: "Please select a workgroup. This is where your records will be updated." Below this text is a dropdown menu with "leadmasterDEVELOP" selected. At the bottom of the dialog are two buttons: "Cancel" and "Next >>".

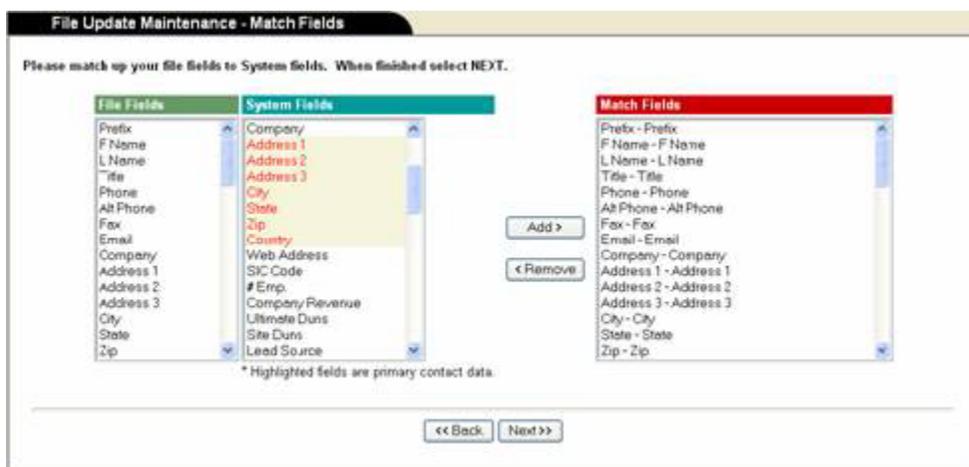
Then locate the file maintenance file to be used in the updating:

The screenshot shows a dialog box titled "File Update Maintenance - Uploading Your File". The main text reads: "Click [Browse...] to find your file, and then click [Next] to upload." Below this is a sub-instruction: "Update file must be a .csv file." A text input field contains the path "C:\LEADMASTER\Update03.csv" and a "Browse..." button is to its right. At the bottom are "Cancel" and "Next >>" buttons.

Chose either a New Template or a stored template (this works like the Import module).

The screenshot shows a dialog box titled "File Update Maintenance - Templates". The main text reads: "Please choose from an existing or create a new update template." Below this is a "File Verification" section with the text: "Number of records on update file: 2 (including header)" and "The number shown above should match the number of records in your update file. If not, Cancel and review your update file." Below the verification section is an "Update Template" label and a dropdown menu. The dropdown menu is open, showing options: "— Select —", "New Template", and "FUM QA Template" (which is highlighted). At the bottom are "Cancel" and "Next >>" buttons.

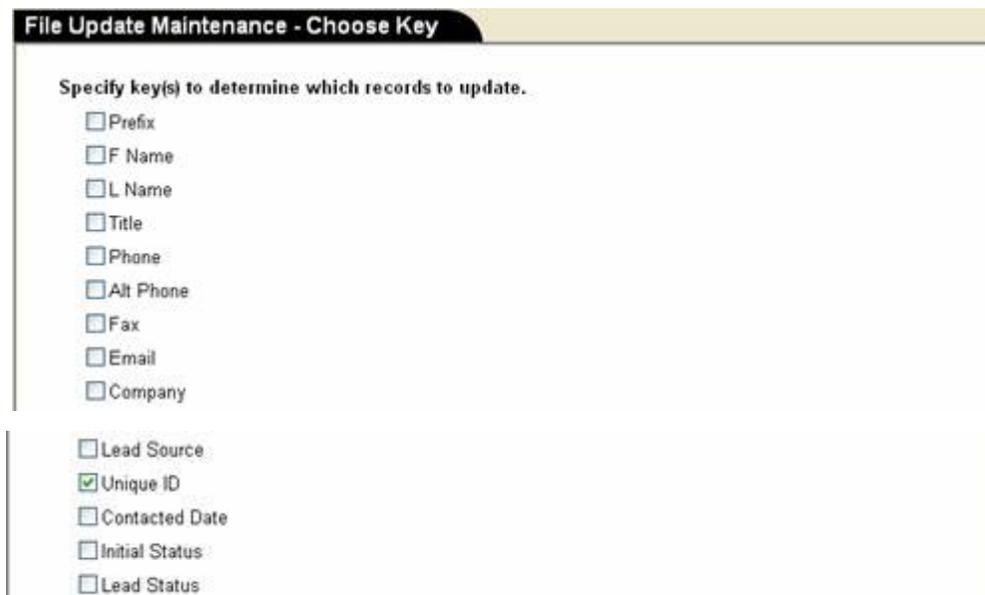
This will bring up the FUM – Match Fields screen where you match the fields that you want to update in the record:



There are currently 54 basic and contact fields available for updating via FUM

NOTE: The FUM function only updates basic leaddb fields and the primary contact information; it does **not** update secondary contacts or custom forms

Then you choose the key field(s) to be used for matching purposes to determine what record is to be updated. In this example, the **Unique ID** field is used as the **Key** field.



IMPORTANT NOTE: It is absolutely crucial that the user of this function understand what keys mean and knows what will make for uniqueness because this function will update **all** records in the workgroup that match on key(s) specified in this screen. For example, if there were duplicate unique IDs in this example, then it would update **all records** with that key. Likewise, if the user chooses to match on say city = Boston and state = MA then this function will update **all records** with city = Boston and state = MA

Then the summary screen is displayed prior to doing the actual update (this works just like the current import routine)

You can save the FUM Template to be used again via the Save or Save As options.

File Update Maintenance - Summary

Ready to update. Before proceeding, click Save to store this template for future updates using this format. Choose Save As to save this template under a new name.

File: f18200417326_Update03.csv
 Template: FUM QA Template
 Database: leadmasterDEVELOP
 No. of Records: 1
 Key(s) to Match: User_Field_23

Save Save As << Back Finish >>

After the update the user is presented with the **FUM Maintenance Log** which shows the files that have been used to update this workgroup. Note that the screen shows the date of the file and displays them in date descending order.

File Update Maintenance Log

Workgroup: leadmasterDEVELOP

Date File Ran	File Name	Updated By	Number of Records in File	Number of Records Updated
1/8/2004 5:20:39 PM	Update03.csv	Richard Dyer	1	1
1/8/2004 4:41:03 PM	Update03.csv	Richard Dyer	1	1
1/8/2004 3:31:36 PM	Update03.csv	Richard Dyer	1	1
1/8/2004 2:15:28 PM	Update03.csv	Richard Dyer	1	0
1/8/2004 1:11:48 PM	Update03.csv	Richard Dyer	1	1
1/8/2004 1:09:01 PM	Update03.csv	Richard Dyer	1	1
1/8/2004 1:05:41 PM	Update03.csv	Richard Dyer	1	1
1/8/2004 1:02:30 PM	Update03.csv	Richard Dyer	1	1
1/8/2004 12:39:59 PM	Update03.csv	Richard Dyer	1	1
1/7/2004 12:45:58 PM	Update02.csv	Richard Dyer	1	1
1/6/2004 12:25:38 PM	Update02.csv	Richard Dyer	1	1
1/6/2004 11:48:36 AM	Update02.csv	Richard Dyer	1	1
1/6/2004 11:46:10 AM	Update02.csv	Richard Dyer	1	1
1/5/2004 10:15:45 PM	Update02.csv	Richard Dyer	1	1
1/2/2004 4:27:13 PM	Update02.csv	Richard Dyer	1	1
1/2/2004 3:32:51 PM	Update02.csv	Richard Dyer	1	1
12/31/2003 6:39:19 PM	_a_LoadFile.csv	Sam Hurdowar	4	6
12/31/2003 6:23:07 PM	_a_LoadFile.csv	Sam Hurdowar	4	6
12/31/2003 5:50:48 PM	_a_LoadFile.csv	Sam Hurdowar	4	0

NOTE: This is the same screen that can be viewed from the **Add New Records** screen and the **File Update Maintenance Logs** option

Manage File Update Templates

This screen can be viewed for the Add New Records screen and the Manage File Update Template option

Update Templates

Workgroup: leadmasterDEVELOP

Template	Workgroup Assigned	Is Public
FUM QA Template	leadmasterDEVELOP	Yes

[add](#) [delete](#)