



Effortless Data Management: Simplifying Importing & Exporting in Sugar

2025 SugarU Live Webinar

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1

Agenda

- Why Data Management Matters
- Import vs. Export: When to Use Each
- Import Lifecycle
- Preparing Your Data Files
- File Formatting Essentials
- Tips for Cleaning Data
- Using Sugar’s Import Tool
- Validating Your Data
- Exporting Data From Sugar
- Maintaining Data Quality Over Time
- Common Pitfalls & How to Avoid Them
- Key Takeaways/Resources/Q&A

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2

Why Data Management Matters?

Drives Reports, SugarBPM, and User Adoption

Clean Data > Better Decisions

Bad Data > Rework, Customer Frustration, Broken Processes

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3

Import vs. Export: When to Use Each

Import When You...

- Add new records at scale
- Update existing data
- Migrate data from another system

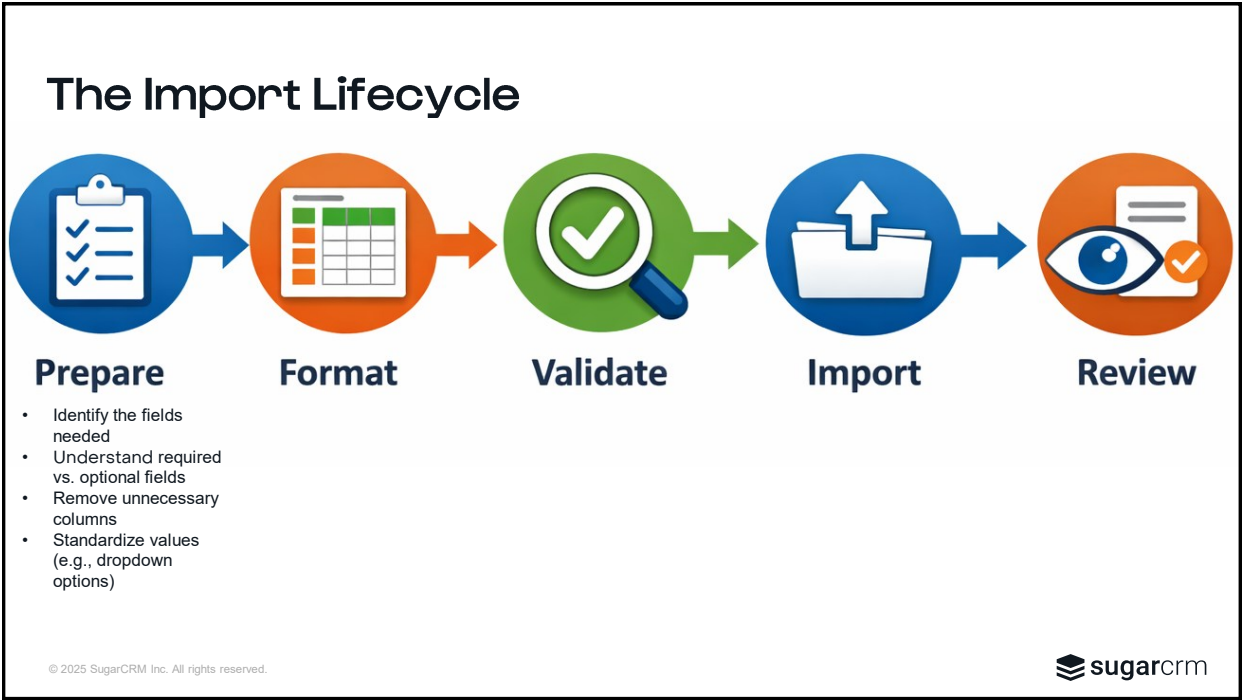
Export When You...

- Need external reporting
- Share data with another system or team
- Want a backup snapshot before making changes

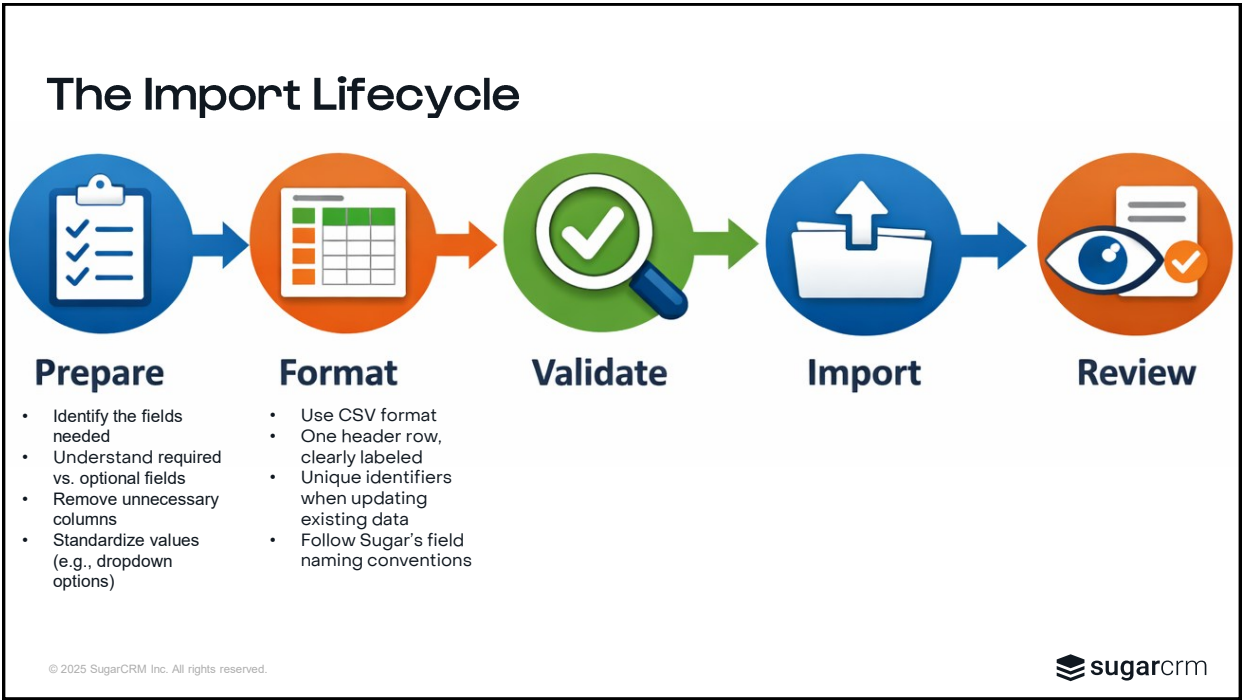
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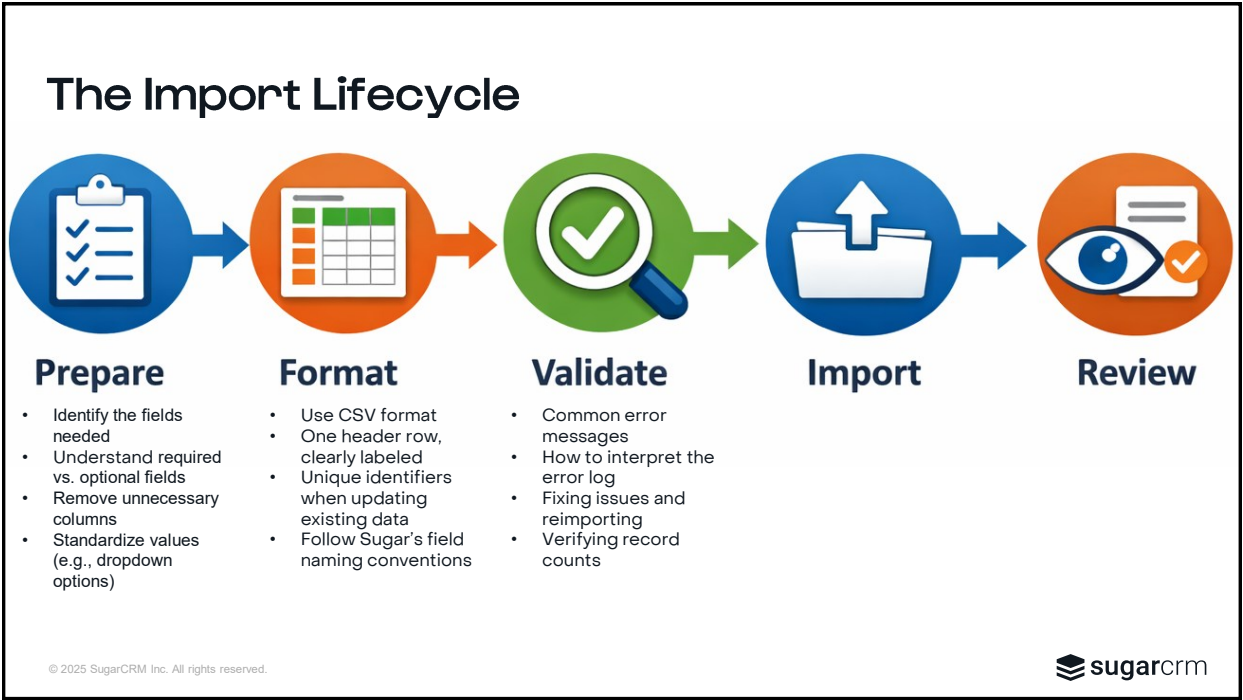
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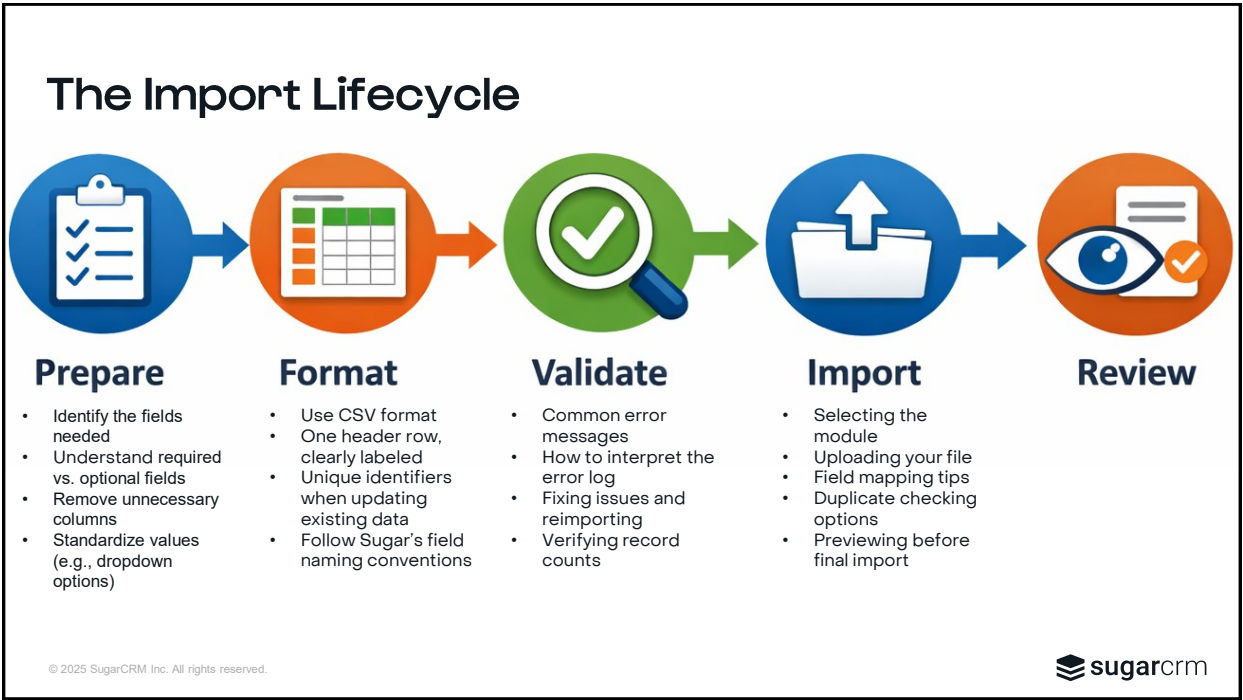
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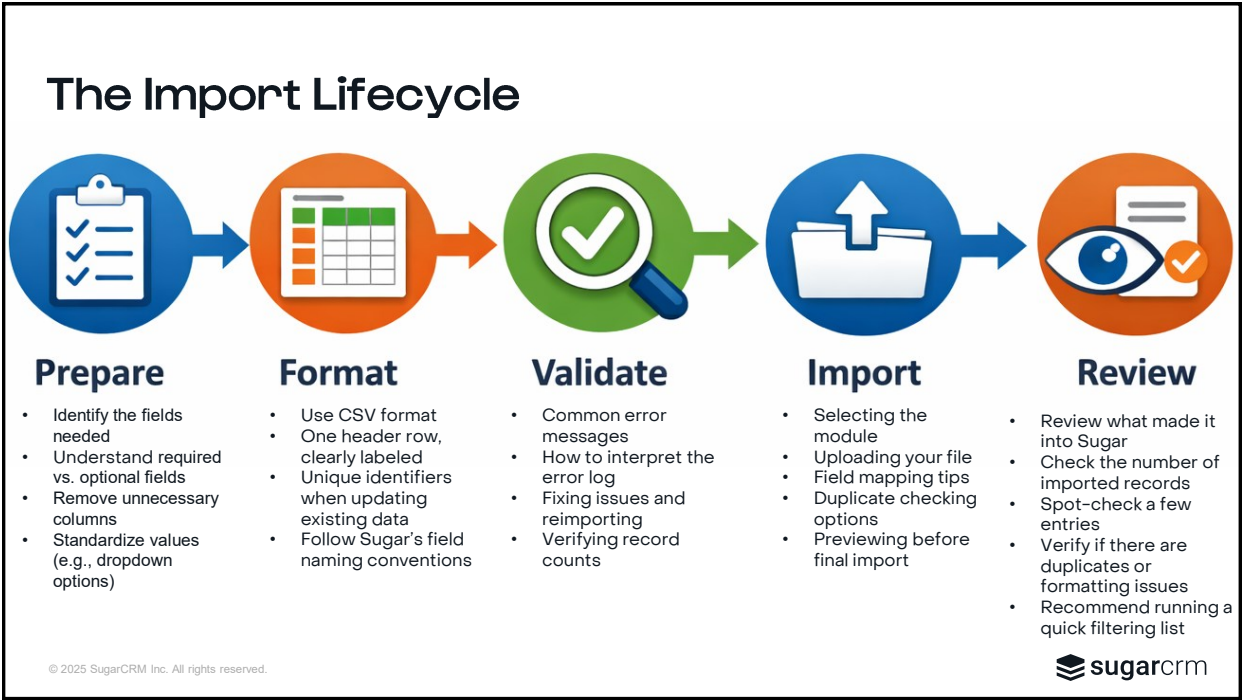
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7



8



9

Tips for Cleaning Data

- Fix inconsistent capitalization
- Remove symbols or extra spaces
- Validate emails and phone numbers
- Use Find/Replace to standardize values
- Deduplicate before importing

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10

Exporting Data From Sugar

- Export all vs. export filtered
- CSV output
- Using exports for audits, reports, and cleanup
- Protecting sensitive data

11

Demonstration

- Importing and Exporting Data

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12

Maintaining Data Quality Over Time

- Schedule periodic audits
- Use deduplication tools
- Train users on consistent entry
- Leverage SugarBPM for validation rules

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13

Common Pitfalls & How to Avoid Them

- Forgetting required fields
- Mapping to the wrong field
- Incorrect date formats
- Duplicate creation
- Updating the wrong records

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14

Key Takeaways

- Know when to import vs. export
- Prep and clean your data first
- Follow formatting best practices
- Use Sugar's tools to validate and protect data quality

15

Additional Resources

- [Sugar Sell Application Guide – Importing](#)
- [Sugar Sell Application Guide – Exporting](#)
- [Admin Fundamentals Virtual Live Class](#) – Feb 2026
- [Help Articles best practices](#)
- [SugarClub Community](#)
- [Sugar Sell Application Guide – Recalculate Value](#)

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16



17



18