**Goal:**

Bring in records of all students from BestNotes system into our Salesforce CRM as Leads—make sure file is organized for successful mapping and data import. This includes parents associated with student, admit date, etc.

Make sure referrals to those students are brought into Salesforce CRM as Contacts—that each of these referrals are correctly linked to student and that each time the referral is used the referral is spelled the same and contact info is the same for that referral. Basically clean up usage of referrals.

Student:  
Sally Johnson

Program:

Trails Carolina

Student:  
Sam Smith

Program:

BlueFire

Student:  
Larry Norton

Program:

ViewPoint

**How to do this:**

I had a longer, different explanation. The data you played with previously was BestNotes data. BestNotes sent me new data yesterday / today and it’s in a much different format than before.

My guess is this format you will make more sense of and have a better idea how to manipulate than I will.

I am giving you a smaller, condensed version of the BestNotes file. This file I am sharing is actually a section of TWO BestNotes files—one for Solstice RTC and another file for Trails Carolina. This will be relevant info in a second. I will explain how this information is organized.

Each contact is given a unique ID number with each BestNotes file. Therefore if there is a Ben Moore in Solstice RTC file his unique ID might be 1234 and the same person in Trails Carolina might be 6789. This would need to be cleaned up—the unique ID is irrelevant for Salesforce (e.g. I don’t need it in Salesforce) but I would imagine Ben Moore with one ID number will be useful for cleaning up the data.

I look at the data as left hand and right hand side, if you will (separate by all of the binary columns). There might be a student number 3456 on left hand side with mom 5678 on right hand side. And then same student number 3456 on left hand and dad 9012 on right hand side. Then same student number 3456 on left hand side with Ben Moore 6789 on right hand side. In other words three rows of student 3456 for each associated contact.

When brought into Salesforce there will be ONE Lead in this situation. First record that is non-referral is primary contact and becomes the Lead Name. In other words, if first row for student 3456 is a referral the referral cannot be the Lead Name. But first non-referral row, let’s say mom 5678, becomes Lead Name. Contact 2 is dad. Student is 3456. And referral linked to that student is Ben Moore. This is the information needed to map to Salesforce—Primary lead with contact info; Other contacts; Student info; Referral (when there is one).