

Meeting 3: Data Import

Last Modified on 04/12/2021 2:25 pm EDT

Prep

☐ Collect your Data

As you prepare for the meeting, it will be important to have your data all in one place. We suggest taking some time now to make sure you have the latest information ready to go. This will also come in handy as we personalize the application. We want to ensure we have all the correct data points/fields available in the application.

Homework

☐ Begin Populating Data

As you begin populating the data import template we typically find it's easier to list the data first and then begin thinking about how it relates to each other. Don't worry, we have a few references to help you:

- Please review the recording from the meeting, which we will send once the meeting finishes.
- We have prepared an article on how to enter new data here:
<https://help.resolver.com/help/enter-new-object-data>
- You can find guidance on how to create the relationship between the data here:
<https://help.resolver.com/help/enter-relationship-data>
- Your Consultant is available for any follow-up calls, please don't hesitate to reach out to us if you need further assistance.

We advise, as a starting point, you spend about an hour on this and then send it back to your Consultant who will review it and provide further guidance to ensure you're on the right track.