SFTP Technicals — Map My Customers

The following document is a breakdown of considerations and specifications about the Secure File Transfer Protocol integration option. Please note, **this integration is an add-on service**. This document exists solely to give further context on the process of setting up SFTP between systems.

Please email us at sales@mapmycustomers.me to inquire about adding SFTP.

Initial Considerations

The following checklist is a step-by-step list of what to prepare prior to setting up SFTP between systems:

- **Identify your SFTP technical contact**
  Identify the person(s) who are familiar with SFTP and ensure approval this process with your IT / technical representative

- **Clean up your data in your source system**
  Clear out any unnecessary fields in your source system / CRM. This reduces clutter and streamlines back-and-forth

- **Create custom fields in Map My Customers**
  Identify which fields in your source system will need a custom field to map to in Map My Customers, then create those fields to ensure a quick mapping process

- **Decide which objects and users will sync**
  Know if you'll be syncing Companies, People, Activities and/or Deals, as well as which users from your source system

- **Decide direction and timing of sync**
  Know if you are looking for a one-way or two-way sync, and whether you'd like syncs to occur in the morning, afternoon or evening

Setup of Inbound Data

1. Submit at least (1) record per Object (Company, Person, Activity, or Deal) via our in-app Import Wizard
    - The import creates a mapping definition that we use as SFTP rules
    - The import technology mirrors how SFTP files are handled, so this is a key step to identifying validation errors
2. Once validated, inform MMC of your sync schedule preference (daily, weekly, or monthly - once per interval is the only supported timing)
3. We will send you a key for each Object type, of which will need to appear in the filename

- The file must be in CSV format
- Your custom key is between 7-14 characters, within this set (A-Z, a-z, 0-9, _-)
- The file name MUST contain the key. However, it can include additional context before and/or after the key. For example, the following are are all valid file names (key is bolded):

a1b2c3d4E-ghw1-2020-01-01.csv
Activities-**a1b2c3d4E**-ghw1-2020-01-01.csv
MyOrganization-Report-PersonName-**a1b2c3d4E**-ghw1.csv

4. Each file can be sent to sftp.mapmycustomers.me, where you will use your MMC user credentials to log in
5. At this point, MMC will verify your set up, and the inbound SFTP process will be set live!

Setup of Outbound Data

1. In Map My Customers, create a Report for each Object you'd like to send outbound from MMC to an email address
2. Name the reports (we recommend adding "autoreport" to the name)
3. Inform MMC of Outbound considerations including
   - The email address you'd like the report sent to. Note that a single report can only go to a single email address. If you'd like multiple recipients on the email, we recommend using a distribution list. If you cannot make a distribution list, you will have to create a separate report with the same parameters.
   - Outbound send frequency (time, as well as daily or weekly)
4. MMC will verify your setup, and the outbound reporting send process will be set live within 1 business day.

For More Information:

If you have yet to inquire about pricing for SFTP, or are not yet an MMC customer, please contact us at sales@mapmycustomers.me

For inquiries about an active or in-progress SFTP configuration, inquire at integrations@mapmycustomers.me