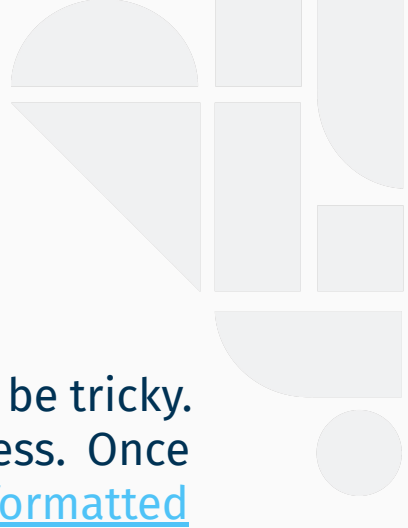




# Migrating Data Into Lever

---

Customer Experience & Solutions



Migrating candidate data into Lever doesn't have to be tricky. We've built a template to help simplify this process. Once your jobs are created, you can [download our preformatted template](#), fill it out, then send it to Lever for upload.

When filling out the template, here are a few columns to highlight:

**Full-Name:** Candidate's full name (Required).

**Email:** Candidate's email address.

**Date-Added:** The date the candidate was created in the system. If left blank, it will default to the date of upload (Required).

**Stage:** The active Lever stage the candidate belongs in (Required).

**Archive-Reason:** If the candidate was dispositioned or hired, the archive reason the candidate belongs in. This can be left blank if the candidate is still active.

**Archive-Date:** The date the candidate was dispositioned or hired. This can be left blank if the candidate is still active. If an archive reason is present, but the archive date is left blank, the archive date will default to the date of upload.

**Sources:** The source the candidate was brought in from.

**Origin:** This is a fixed list - Applied, Sourced, Referred, University, Internal, Agency (Required).

**Tags:** You can separate multiple tags by comma (no spaces).

**Phone:** You can separate multiple phone numbers by comma (no spaces).

**Links:** You can separate multiple links by comma (no spaces).

**Referrer:** If referred, you can place the referrer name here.

**Resume-Filename:** The matching resume filename if applicable.

**Lever-Posting-URL:** You can grab the external link to the job and place it here. If left blank, the candidate will be associated with a general opportunity.

**Owner:** If no owner is set, it will default to the owner of the job posting.

**Note-0:** If you have notes/feedback on the candidate, you can add the note here. You can also specify the creator, date, and privacy of the note in the respective column.



## After filling out the preformatted CSV, your final output may look like this:

C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	
Full Name	Email	Date Added	Stage	Archive Reason	Archive Date	Sources	Origin	Tags	Phone	Location	Lever Postin	Referrer	Resume File	Company	Owner	Links	Post
Klay Thompson	kt@gsw.com	1/3/12	Offer	Hired	1/7/12	LinkedIn	Sourced		415-303-312	Charlotte, NC	https://jobs.lever.co/leverdemo/dac7a8ff-8c1c-499e-abae-8136d471cdb6	https://jobs.lever.co/leverdemo/dac7a8ff-8c1c-499e-abae-8136d471cdb6					
Stephen Curry	sc@gsw.com	3/6/13	Offer	Hired	4/7/13	Glassdoor	Sourced		415-942-213	Seattle, WA	https://jobs.lever.co/leverdemo/dac7a8ff-8c1c-499e-abae-8136d471cdb6	https://jobs.lever.co/leverdemo/dac7a8ff-8c1c-499e-abae-8136d471cdb6					
Draymond Green	dg@gsw.com	4/9/14	New Applicant	Underqualified	4/20/14	Job site	Applied		510-392-281	Saginaw, MI	https://jobs.lever.co/leverdemo/dac7a8ff-8c1c-499e-abae-8136d471cdb6	https://jobs.lever.co/leverdemo/dac7a8ff-8c1c-499e-abae-8136d471cdb6					
Kevin Durant	kd@gsw.com	4/10/14	New Lead	Overqualified	4/17/14	LinkedIn	Applied		510-302-231	Baltimore, MD	https://jobs.lever.co/leverdemo/dac7a8ff-8c1c-499e-abae-8136d471cdb6	https://jobs.lever.co/leverdemo/dac7a8ff-8c1c-499e-abae-8136d471cdb6					
Andre Iguodala	ai@gsw.com	5/1/12	On-Site Interview	Position Filled	5/3/12	Referral	Referred		415-987-341	Springfield, IL	https://jobs.lever.co/leverdemo/dac7a8ff-8c1c-499e-abae-8136d471cdb6	https://jobs.lever.co/leverdemo/dac7a8ff-8c1c-499e-abae-8136d471cdb6					
Patrick McCaw	pm@tr.com	8/1/18	New Lead	Better Fit For Another Role	9/1/18	Job site	Applied		415-349-319	St. Louis, MO	https://jobs.lever.co/leverdemo/dac7a8ff-8c1c-499e-abae-8136d471cdb6	https://jobs.lever.co/leverdemo/dac7a8ff-8c1c-499e-abae-8136d471cdb6					
James Wiseman	jw@rook.com	2/1/20	New Applicant			LinkedIn	Sourced		394-293-239	Nashville, TN	https://jobs.lever.co/leverdemo/dac7a8ff-8c1c-499e-abae-8136d471cdb6	https://jobs.lever.co/leverdemo/dac7a8ff-8c1c-499e-abae-8136d471cdb6					
Jordan Poole	jp@gsw.com	9/1/19	New Lead			Job site	Applied		415-304-321	Milwaukee, WI	https://jobs.lever.co/leverdemo/dac7a8ff-8c1c-499e-abae-8136d471cdb6	https://jobs.lever.co/leverdemo/dac7a8ff-8c1c-499e-abae-8136d471cdb6					

### What else should I know to ensure proper migration of our data?

- Each row will create a new candidate opportunity in Lever.
- Preserve all column headings.
- Ensure correct spelling. For example:
  - “New Lead” for Stage, not “Lead”
  - “JohnSmith\_Resume.pdf” not “John Smith resume”
- Lever will catch duplicate profiles. If the candidate has multiple applications, please make sure the email addresses are the same to ensure a proper merge.

### Should I migrate all my data?

A lot of customers will choose to migrate a subset of their data, but it’s ultimately up to your team to decide what data you want to have represented in Lever.

### Do I need a technical background to complete the data migration on my own?

Absolutely not. A lot of legacy data extracts will be presented in CSV format. The bulk of the work is to transfer the data from the respective CSVs into Lever’s preformatted template. This will require a lot of copying and pasting between spreadsheets, but having a basic knowledge of Excel can definitely help speed up the process.

### Once I fill out the CSV, what’s next?

Once you have filled out the CSV, you can send it to Lever’s [support team](#) for upload. If you have resumes, please include them in a ZIP folder on the same request. It will typically take our support team 3-4 business days to complete the upload. *Please make sure to audit your data prior to sending to Lever to ensure a smooth transition.*

### What if I only want to upload the resumes?

You can send our [support team](#) a ZIP folder of all the resumes and we can upload the resumes en masse. Each resume will create a candidate profile and will be associated with a general opportunity. All candidates will be uploaded into the “New Applicant” stage unless another status is specified.

### Aren’t origin and source the same thing?

We know from our customers that many users organize their sources into higher-level categories. We call these broader categories origins (applied, sourced, referred, internal, agency, university). Origins allow you to group your sources together and build reports on these sources in bulk.

