The *Import* feature enables you to upload a list of prospects from a simple excel template that you've created at your marketing event.

Note:

- 1) Marketing Event Detail- Community is a mandatory field for the prospect to be added properly using 'Import' feature.
- 2) Prospect Status is also a mandatory field.

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Marketing Event Detail		Edit Delete Clone	Submit for Approval	Import	
Marketing Event Name	End of Summer BBQ			Owner	👤 Larry Wieskopf [Change]
Community	iaRetirement - GTA	1)		Event Date	2/2/2012
Туре	Marketing; Resident Li	festy.			
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Lead Source				Type of Inquiry	
Prospect Status	Unqualified Unknown	2)		Follow up Date	
Created By	Larry Wieskopf, 12/30/	2010		Last Modified By	Larry Wieskopf, 9/21/2012 2:34 PM
				Community Filter	iaRetirement - GTA
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## Your Excel Template should contain these Column Headers.

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	First Name	Inquirer Last Name	Street (include # Street Apt)	City	Province	Postal Code	Phone	E-mail		J
	First Name	Inquirer Last Name	Street (include # Street Apt)	City	Province	Postal Code	Phone	E-mail		J
	First Name	Inquirer Last Name	Street (include # Street Apt)	City	Province	Postal Code	Phone	E-mail		J

After typing in a maximum of 20 Inquirers, make sure to Save the file As a .CSV file.

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When you have everything set (Community, Prospect Status, and your templates), click 'Import'.

Groundhog D	ay				Cus	stomize Page   Edit La
	Open Activities [0]   Act	tivity History [5]	Notes & Attachments	101   Pro		endees [7]   Prosper
Marketing Event Detail		Edit Delete	Clone Submit	for Approval Im	port	
Marketing Event Name	Groundhog Day				Owner	🔍 Larry Wieskor
Community	iaRetirement - GTA				Event Date	2/2/2012
Туре	Marketing; Resident	Lifestyle				
▼ Planning						
Marketing Plan	Monthly Community (	Outreach			Audience	Prospect; Reside
Budget	8800.00					
Target No. of Visitors	20					

Click *Browse* and search your desktop for the template you have just created.

涂 Upload data from CSV file				
The value of the paramter name passed to this page is :a08A0000009JELK				
	E	Browse	Upload File	
Note: Please use the	standard template to unload Pr	ospects Cl	lick here to download the template	

Click *Upload File* and there will be a summary of the prospects you had on your excel sheet. They have all been added as prospects connected to your community and that marketing event.

Note: Currently only 20 prospects at a time can be uploaded. Create different files to make it easier to also sort by Prospect Status. Just change the status when doing another import of Prospects with the same status.