

# How to Import Prospects from a Marketing Event

#### **Description**

Use this function to upload a list of prospects from a simple excel template that has been created at your marketing event.

The system will:

- Create a prospect for each line in the spreadsheet
- Create a follow-up task for each prospect

Note: The system does not check for duplicates or update Marketing Events Attended at this time

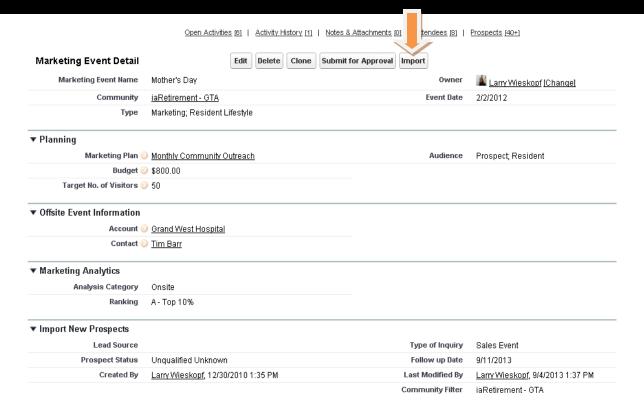
#### **Step by Step**

- I Navigate to the Marketing Events tab
- Select the marketing event into which you would like to import new prospects
- **3** Scroll down to the section titled Import New Prospects
- 4 Select the **Prospect Status.** At this point, the **Prospect Status** is generally *Unqualified Unknown*, as you may not have had a chance to collect this information at the marketing event.
- 5 Select Sales Event as the Type of Inquiry
- Specify a Follow Up Date
- **7** Verify the **Community Filter**
- 8 Click Save
- 9 Click Import

Updated: October 30, 2013



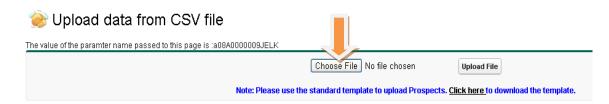
### Importing Prospects from Marketing Event



- Download the standard excel template by clicking Click here
- Fill out the template with the prospects' information and save it as a csv file

	А	В	С	D	Е	F	G	Н
1	Inquirer First Name	Inquirer Last Name	Street (include # Street Apt)	City	Province	Postal Code	Phone	E-mail
2	Adams	Brad	1522 Front Street	Toronto	ON	M2M3Y0	555-555-5555	brad@adams.com
3	Schultz	Beverley	655 Bailey Street	Thornhill	ON	L4J3E8	555-555-5556	bev@schultz.com
4								
5								
6								
-								

- 12 Back on the upload screen, click Choose File
- 13 Choose the file and click Open



Click **Upload File.** A summary of the prospects that were entered on your Excel spreadsheet will be displayed. They have all been added as prospects connected to your community.

Updated: October 30, 2013



# Importing Prospects from Marketing Event

## ò Upload data from CSV file

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