



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

- 1** Navigate to the Marketing Events tab
- 2** 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**
- 6** Specify a **Follow Up Date**
- 7** Verify the **Community Filter**
- 8** Click **Save**
- 9** Click **Import**

Importing Prospects from Marketing Event

[Open Activities \(8\)](#) | [Activity History \(1\)](#) | [Notes & Attachments \(0\)](#) | [Attendees \(8\)](#) | [Prospects \(40+\)](#)

Marketing Event Detail

Marketing Event Name	Mother's Day	Owner	Larry Wieskopf [Change]
Community	iaRetirement - GTA	Event Date	2/2/2012
Type	Marketing; Resident Lifestyle		

▼ Planning

Marketing Plan	Monthly Community Outreach	Audience	Prospect; Resident
Budget	\$800.00		
Target No. of Visitors	50		

▼ Offsite Event Information

Account	Grand West Hospital
Contact	Tim Barr

▼ Marketing Analytics

Analysis Category	Onsite
Ranking	A - Top 10%

▼ Import New Prospects

Lead Source		Type of Inquiry	Sales Event
Prospect Status	Unqualified Unknown	Follow up Date	9/11/2013
Created By	Larry Wieskopf, 12/30/2010 1:35 PM	Last Modified By	Larry Wieskopf, 9/4/2013 1:37 PM
		Community Filter	iaRetirement - GTA

- 10** Download the standard excel template by clicking [Click here](#)
- 11** Fill out the template with the prospects' information and save it as a csv file

	A	B	C	D	E	F	G	H
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	<input style="width: 100%;" type="text"/>							
5								
6								

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


Upload data from CSV file

The value of the paramter name passed to this page is :a08A0000009JELK

No file chosen

Note: Please use the standard template to upload Prospects. [Click here](#) to download the template.

- 14** 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.

 **Upload data from CSV file**

The value of the paramter name passed to this page is :a08A0000009JELK

No file chosen

Note: Please use the standard template to upload Prospects. [Click here to download the template.](#)

Inquirer First Name	Inquirer Last Name	CommunityFilter
Adams	Brad	iaRetirement - GTA
Schultz	Beverley	iaRetirement - GTA