STEPS TO IMPORT YOUR DATABASE

market leader

IMPORT FAQs

How many people can I import at a time?
You can import up to 10,000 prospects per file and you can import multiple files per day.

What information is required to import a prospect?
Each prospect record will need to include the first and last name, and either the email address or the physical (mailing) address.

What file types can I use?
You can download a "Custom CSV" file from the import page and use that to import your prospects. You can also export your prospects from Top Producer 8i, My Red Tools, or Outlook 2007 and then use the very same export sheet to import those prospects into your Market Leader system. You can use the Custom CSV file for all other exports (gmail, yahoo, etc.).

HOW DO I IMPORT MY PROSPECTS?

Create groups
Placing prospects in groups will allow you to target your future marketing to specific types of prospects.

- ✓ Identify your marketing strategy: Who will you want to contact and when? E.g., first time home buyers, investors, and out of town prospects.
- ✓ Create groups based on your marketing strategy.

Prepare your master spreadsheet
Review your spreadsheet and confirm:

- ✓ All the prospects are people you know who have agreed to receive information from you. Do not import public lists or purchased lists because people who don't know you may report your email as spam.
- ✓ All the required information is included (First name, last name, email address and/or complete physical address).
- ✓ All the information is accurate (Email addresses, phone numbers, additional info, etc.).
- ✓ All the information you're expecting to import is on the file. (This is especially important when importing from Top Producer.)
- ✓ The information is in the correct columns.
    - For Physical address, use the field called "Primary Address," "Home Address" or "Address 1." (The name of the column heading will vary according to the spreadsheet you're using.)
    - Keep all columns in the original order. Do not delete columns or change the column order.
    - Keep the column headings as the original names. Do not change the column names.
- ✓ Save the file in the .CSV format. (Mac users, save your file in "Windows CSV" format.)

Create one spreadsheet per group

- ✓ Separate your master spreadsheet into multiple smaller spreadsheets, so you have one small spreadsheet per group.
  - To do this, reorganize the order of the rows so all the similar prospects are together. For example, rows 1 – 15 can be investors, 16 – 45 can be first time home buyers, etc. (The groups and number of rows will vary for each agent.)
  - Resave and rename each smaller spreadsheet under the appropriate group name. Include only your relevant prospects on each spreadsheet. (e.g., "Investors" spreadsheet with investor prospects). When you're done, you will have one spreadsheet per group.
- ✓ Confirm the rows on each spreadsheet are accurate.
  - Double check the first five rows.
    - Confirm the first five prospects have all the required information (First name, last name, email address and/or complete physical address). This is required for the spreadsheet to import.
    - If any of the prospects in the first five rows has an aol.com email address, move that prospect down past the sixth row. Otherwise that address could be blacklisted.
  - Ensure each prospect's information takes up only one row. (This is especially important when importing from Top Producer.)
  - Confirm you do not have any duplicate prospects. (You can import each prospect once).

Import your first group

- ✓ Go to the "Import" page of your Market Leader system.
- ✓ Start with your smallest group/spreadsheet. We recommend doing a small test batch first.
- ✓ Select the appropriate labels for this spreadsheet. Note: All prospects on your spreadsheet will be given the three labels you select.
  1. Select the appropriate group name. (Putting prospects in a group is optional.)
  2. Select the prospect status. Best practice is to put prospects into the "Inactive" status. This will help you quickly identify active leads on your Recent Activity report. (Do not use the "Lead" or "New" status.)
  3. Select the prospect type.
- ✓ Select the type of file you're going to import.
- ✓ Click "Browse" and select the import file you've already saved on your computer.
- ✓ Double check to confirm steps 1 - 4 on the Import page are exactly as you'd like.
- ✓ Click "Import."

Congratulations! You've completed the steps to import your database!