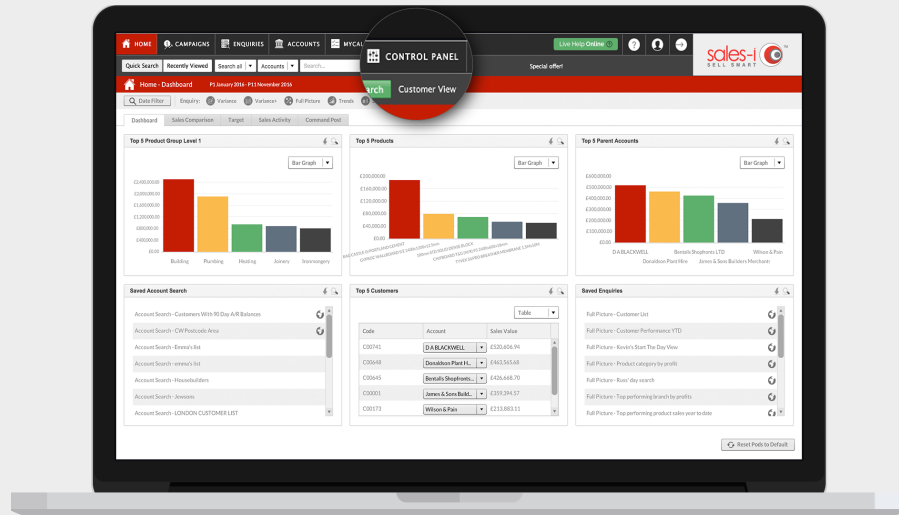


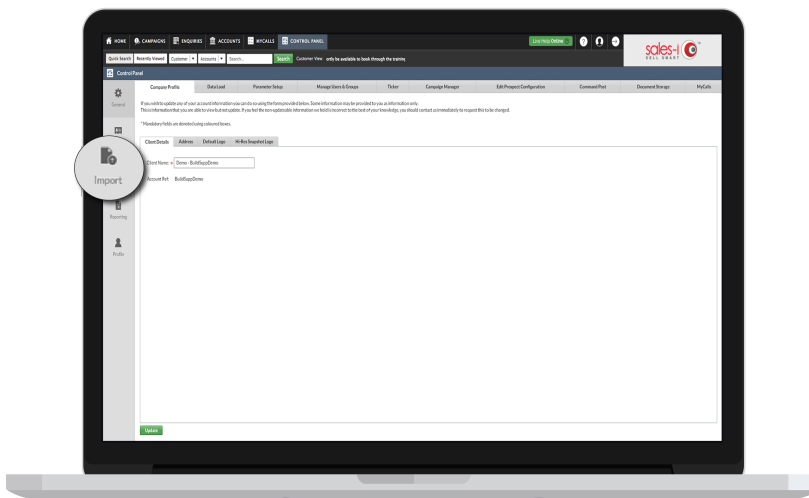
HOW TO USE THE PROSPECT IMPORTER

Using the Prospect Importer feature allows you to add in your own prospects and significantly cuts down the time it takes us to get you live and using the sales-i system. Please note this feature is for Power Users only.

01 From the navigation bar at the top, select **Control Panel**.

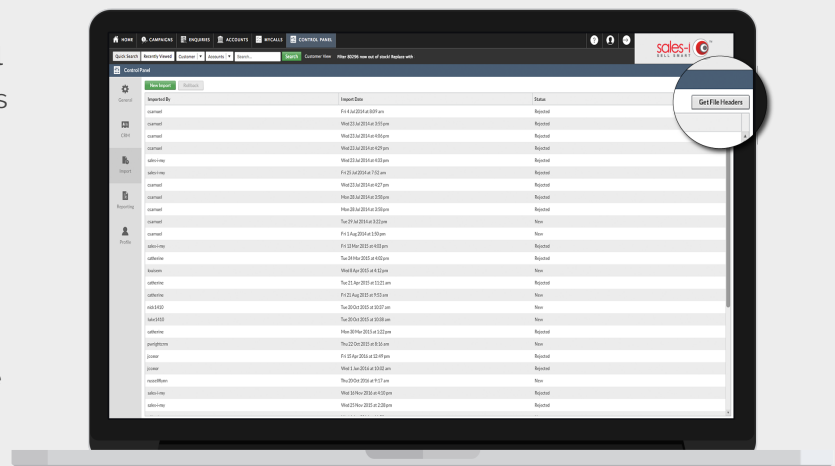


02 Click **Import**, from the left hand column. Once selected, the Prospect Importer log page will load.



03 **Get File Headers** tool will give you an Excel document populated with all of the headers that sales-i will use to organize your data, so you can copy and paste your data into the matching columns.

Please Note: It is critical that the upload file is formatted correctly for the import to be successful. Click **Get File Headers** to ensure the format is correct.



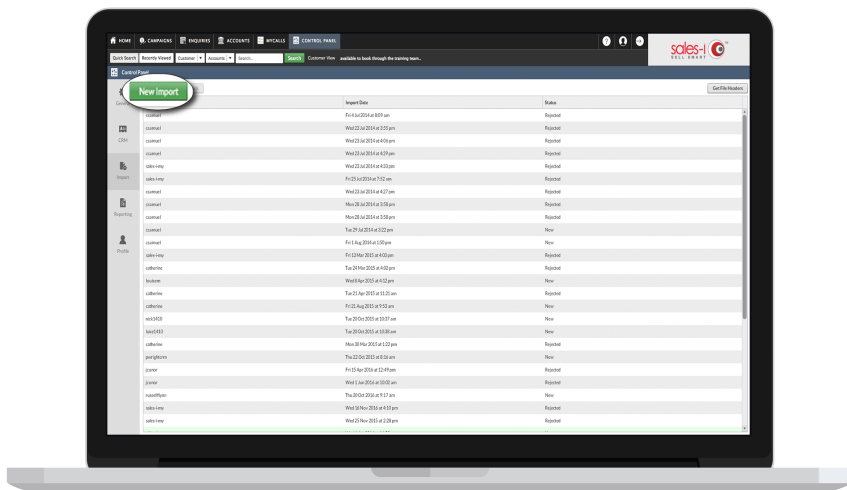
04 Your file is now ready to download, to do so, click **Download Your Report.***

*Your browser may block this, so make sure your settings allow pop-ups.

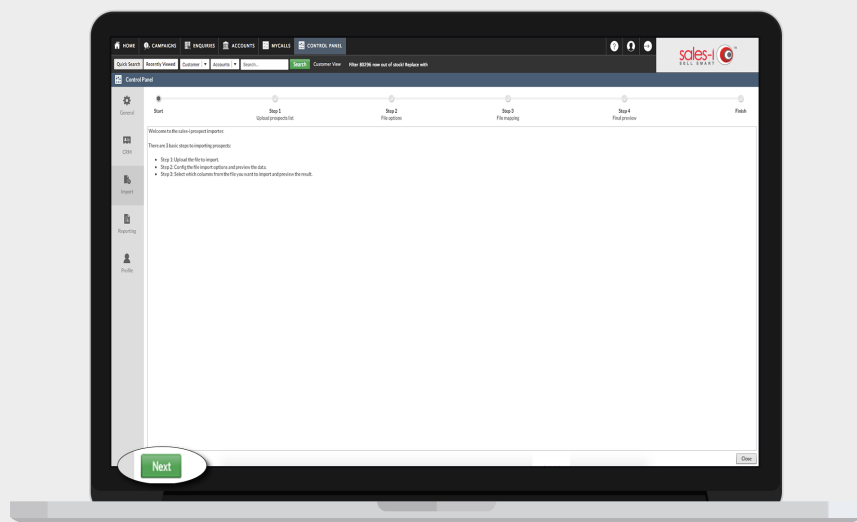
Open up the file, copy and paste your data in and, when you're finished, save as either a **.csv** or **.txt** file.



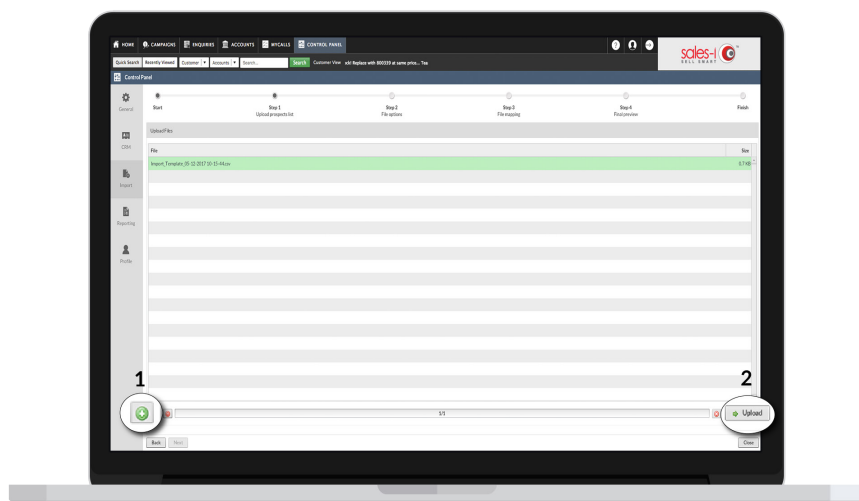
05 You can start to import your data by selecting **New Import.** This can be found in the top left of the import screen.



06 Click **Next**

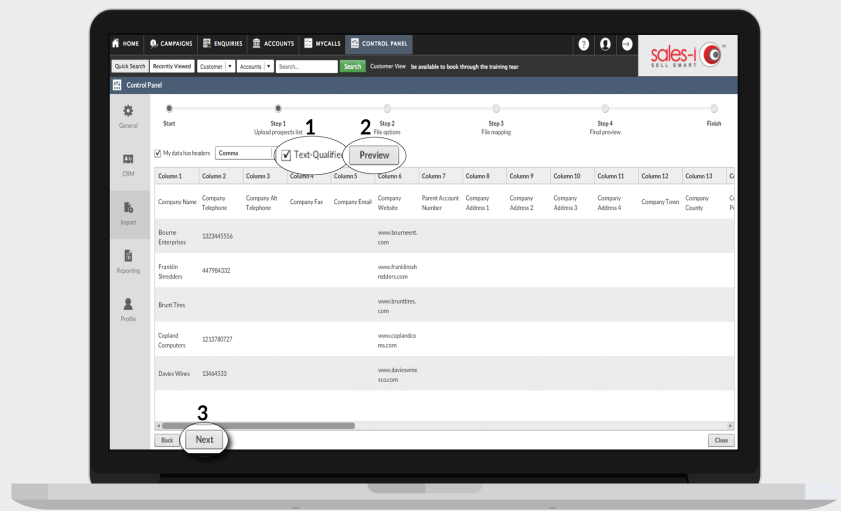


07 Once in the new import window, click the green **+** sign in the bottom left-hand corner, find your file and then, click **Upload**, which will be visible in the bottom right hand corner.



08 Select whether your data has headers and how the headers are separated (by comma, tab or pipe). If you've saved as a .csv file, your data will be separated by commas.

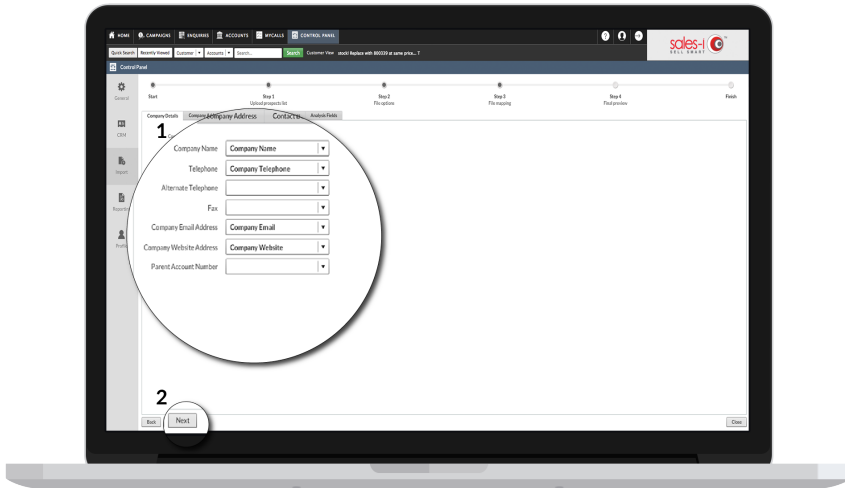
Make sure that the **Text-Qualified** box is ticked and then click **Preview** followed by **Next**.



09 Now, go through each tab (**Company Details, Company Address** etc.) matching up your columns with those available from the list.

Don't worry, some can be left blank.

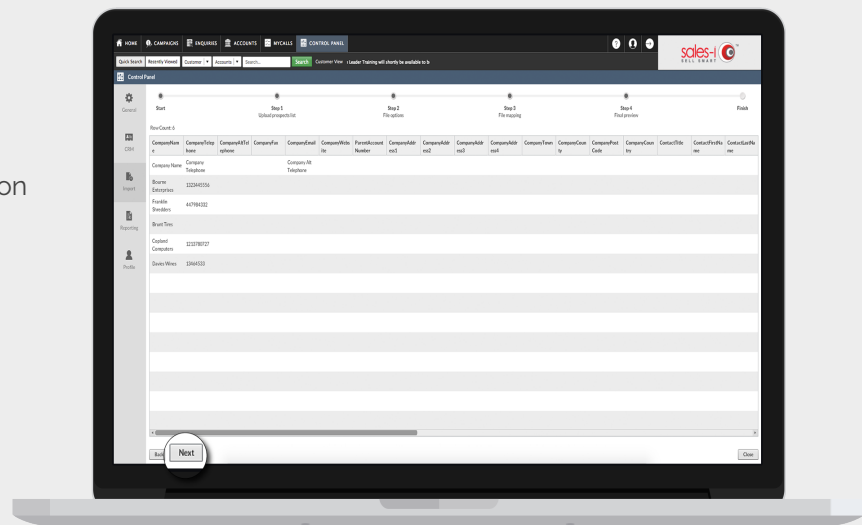
When you're done, click **Next**.



10 You will now see a final preview of your data.

If you spot any issues, click the **Back** button to go back and adjust your import.

Click **Next**, to complete your import.



TOP TIP

Try uploading 4 or 5 Prospects as a test run before bulk uploading the full list, so you can check and easily correct any errors.