wealthcraft

WealthCraft

Importing Leads Process Guide

October 2014

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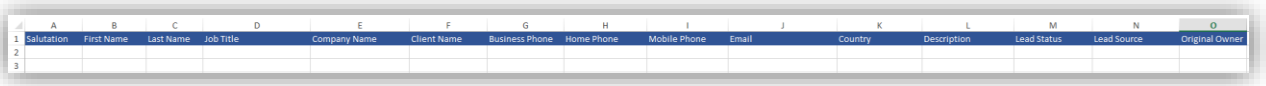
Part 1 – Populating the Lead Information

Firstly, you will need to download the **Lead Import Template** from the WealthCraft Support Material page which can be accessed via your adviser landing page or by clicking on the following link:

After you have downloaded the XLS Spreadsheet, the following document will be displayed:



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Salutation	First Name	Last Name	Job Title	Company Name	Client Name	Business Phone	Home Phone	Mobile Phone	Email	Country	Description	Lead Status	Lead Source	Original Owner
2															
3															

Enter all the information you know about the lead in the relevant fields. Below is the minimum fields that will need to be populated in order for the import to be successful:

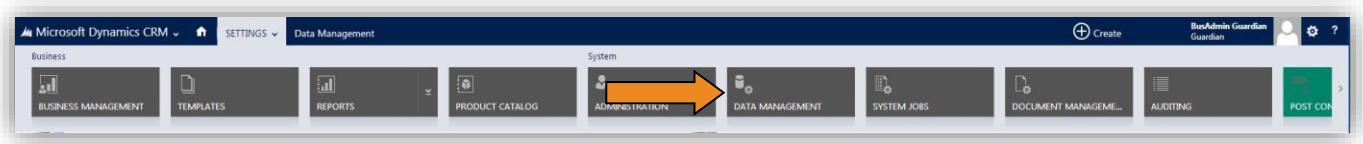
- **First Name**
- **Last Name**
- **Contact Number (i.e. Business/Home Phone)**
- **Original Owner**

Once you have finished entering all the required information, save the document as a 'XML Spreadsheet 2003'. You are then ready to import the lead into the system.

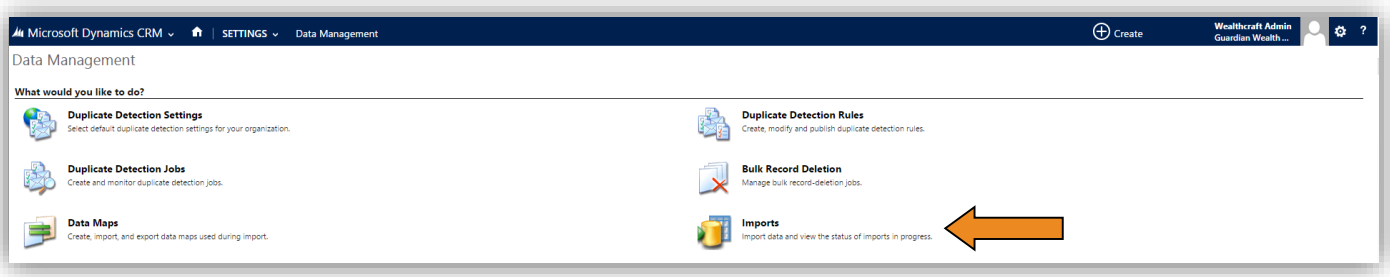
Part 2 – Importing Leads

In order to successfully import leads into the WealthCraft system, follow the below steps.

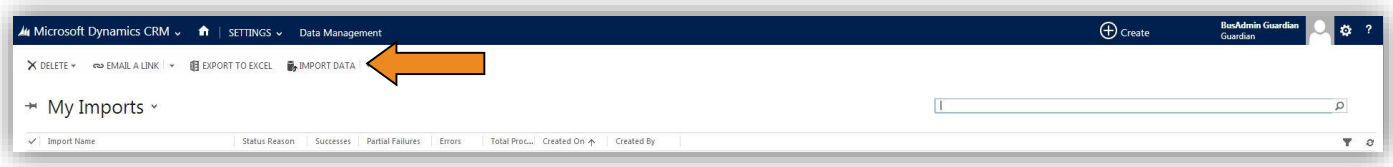
From any screen in the system select **Microsoft Dynamics CRM > Settings > Data Management.**



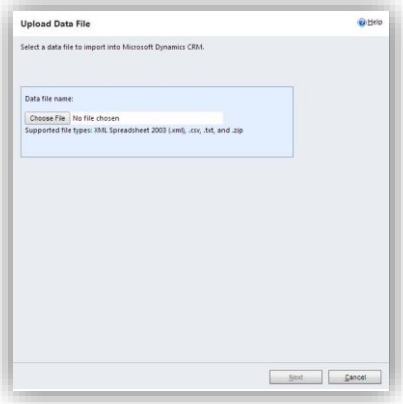
The screen that is now displayed will show all Data Management options in the system that you have access to. Click on the **Imports** button as per below.



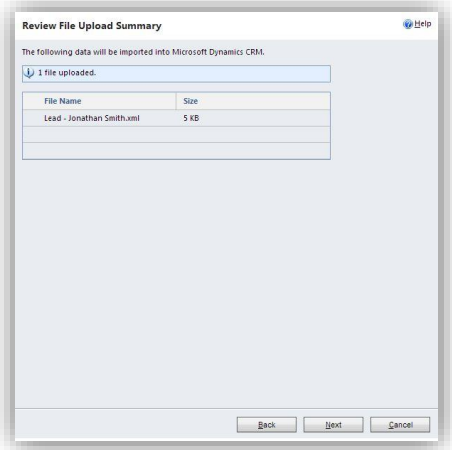
The screen that is now displayed will show all your previous Imports into the system. Click on the **Import Data** button as per below.



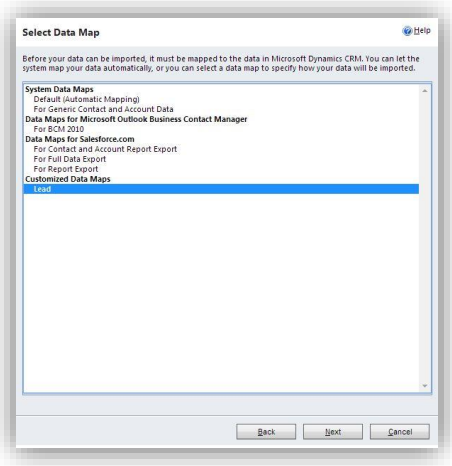
A new window will appear allowing you to choose a file to upload. Select the XML Spreadsheet 2003 file that you created in Part 1 and click **Next**.



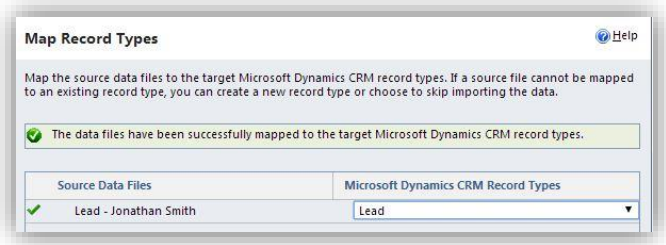
A new screen will appear reviewing the files you are trying to upload. If you are happy with the summary of files, click **Next**.



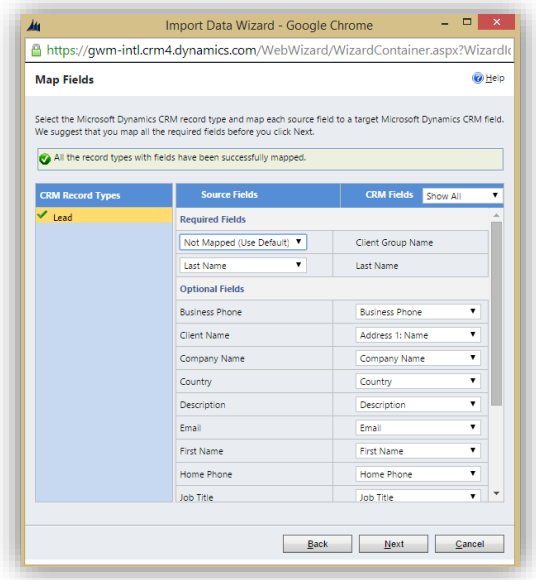
You will then be asked to ensure that all the data is being mapped to the correct formatting for WealthCraft. To do this, select **Lead** underneath the **Customized Data Maps** heading and click **Next**.



Then select the **Map Record Type** as **Lead** from the dropdown list and click **Next**.



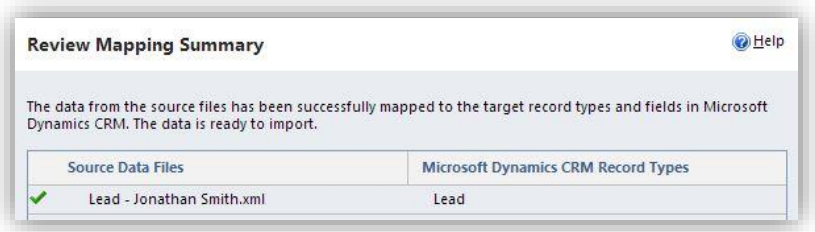
You will then need to map any fields that have not mapped correctly. If you have entered the minimum amount of information as specified earlier, then you will only have to change the below fields:



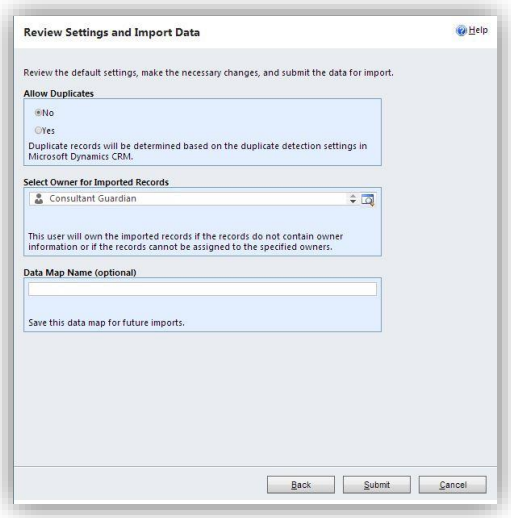
- **Client Name** – Select **Address 1: Name** from the dropdown to the right;

Then click **Next**.

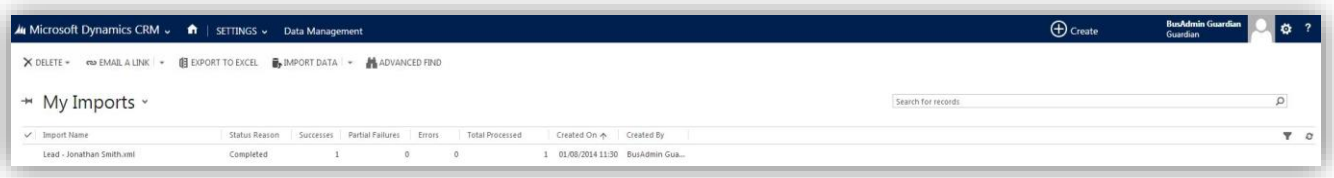
You will now see the following screen and a green tick next to your successfully mapped import(s). Click **Next**.



In the Review Settings page, ensure that No is selected in the Allow Duplicates section. Then select the appropriate co-ordinator by using the search button in the **Owner for Imported Records** section. Click **Submit**, then click **Finish**.



You will now be taken back to the main Imports screen, displaying the Lead that you have just imported.



This lead will be automatically generated in **Microsoft Dynamics CRM** > **Client Management** > **Leads**.

The process is now complete.