

Manage Lead Interest With Data Import Interest Expire Workflow

This article will help understand how imported leads and lead interests are managed in the LRM system.

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The data import interest expiration workflow helps the WSB maintain and manage an engaged and accurate prospect pool. The agreed-upon expiration time frame for imported prospects whose **interest record has not been updated or confirmed from a data import** is 12 months. This standard is based on GMASS data use agreement and expanded to all prospect data imports entered into the system.

What actions automatically confirm the interest on the prospect record?

The following actions in the system update and confirm the interest of the prospect:

- Request for information form submission
- Event registration form submission
- Application started by the prospect
- Update Interests button signifying direct contact with WSB staff

How does a WSB staff member confirm the interest on a prospect record, so that the prospect is not set to Inactive?

To manually **validate the interest** on the prospect record, use the **Update Interests** button to change the source of the interest from Data Import (or Rollover) to Direct Contact.

User instructions: [How to add or update program interests for an existing contact.](#)

Under what conditions is an interest on a prospect record set to past?

The data import interest on the prospect record will be set to past when the following conditions are met:

- Exactly 12 months have passed since import (based on date of import)
- Current interest record **matches** the interest record added by the initial data import
- No additional interest record has been created to confirm the interest of the prospect

If only one data import interest existed on the prospect record at the time of interest expiration:

- Interest associated with the data import will be set to past
- Lead Status will be set to Inactive
- Reason Lead Inactive will be set to Import Expiration

If more than one interest exists on the prospect record at the time of interest expiration:

- Interest associated with the data import will be set to past
- Lead Status will not be changed

How does the system determine which interests came from a data import?

The prospect interest **Source** and **Received On** date is how the system finds data import interests.

The source of the interest and the received on date are compared with the original data import interest added to the prospect record. Note that the interest source could be "Rollover" meaning that the interest was rolled over during the yearly system data rollover (typically end of fiscal year).

Example: Current interest record with **Source = Data Import** will be set to Past on 10/13/2015, exactly 12 months after Received On date. The Application interest would remain Current on the record.

Lead Information

Lead Summary

Engagement Level --

Last Interest Change 8/12/2016 1:10 PM

Lead Last Activity 8/12/2016 1:10 PM

Admissions Registrati --

Lead Initial Source **Data Import**

Lead Rollover Reason --

Reason Lead Inactive --

Lead Interests

Current Lead Interests - Grid Vie... ▾

Term	Academic Care..	Program Type	Lead Interest P..	Interest ↑	Qualification S..	Created On	Received On	Lead Interest S..	Source
Fall 2017	Undergraduate	Undergraduate	BBA BEL	Undecided/Not ...	0-Undetermined	8/12/2016 1:10 PM	8/12/2016 1:10 P..	Current	Data Import

Example: Current interest record with Source = Rollover will be set to past on 9/26/2015, exactly 12 months after Received On date.

Select **All Lead Interests** to view Past and Current interests on prospect record.

Lead Interests

Current Lead Interests - Grid Vie... ▾

Term	Academic Care..	Program Type
System Views		
All Lead Interests - Grid View		
Current Lead Interests - Grid View		
Past Lead Interests - Grid View		
Save Filters as New View		
Save Filters to Current View		

The Current interest record with Source = Rollover has the same Received On date as the original Data Import interest. No other sourced interests exist, thus this contact will be set Inactive after the interest expires.

Lead Interests

All Lead Interests - Grid View ▾

Term	Academic Care..	Program Type	Lead Interest P..	Interest	Qualification S..	Created On ↑	Received On	Lead Interest S..
Fall 2017	Undergraduate	Undergraduate	BBA Pre-Business	Undecided/Not ...	0-Undetermined	2/10/2017 1:10 PM	2/10/2017 1:10 P	Current
Fall 2017	Undergraduate	Undergraduate	BBA Pre-Business	Undecided/Not ...	0-Undetermined	2/14/2017 12:39 PM	2/14/2017 12:39	Past

How can I see a list of people that are going to expire on a certain import list?

There are advanced finds saved under People and a Dashboard that can help your office be proactive with imported contacts that are soon to expire.

People Views

To view contacts sourced from a specific import, the interest **Received On** date in the query should be updated to reflect the date of the import. Advanced find saved views that are available for review:

Admin: Data Import Interest Expire (Change Date, Review)

This view shows all active contacts imported on a specific date.

Admin: Data Import Interest Expire - Email CLICK Activity (Change Date, Review)

This view shows all active contacts that have click on automatically sent emails in last 3 months.

Admin: Data Import Interest Expire - Email OPEN and/or CLICK Activity (Change Date, Review)

This view shows all active contacts that have opened and/or clicked on automatically sent emails in last 3 months.

1. Find the **Created On** date for the import contact data you would like to review (under Workplace > Logs).

Active Logs

Created On	Name
5/24/2017 12:45 PM	BBA Reviewers Scores Import - 2017_05_24-12_45
5/19/2017 3:00 PM	BBA Reviewers Scores Import - 2017_05_19-15_00
5/5/2017 9:15 AM	BBA Reviewers Scores Import - 2017_05_05-09_15
5/5/2017 1:00 AM	BBA Reviewers Scores Import - 2017_05_05-01_00
5/4/2017 11:45 PM	BBA Reviewers Scores Import - 2017_05_04-23_45
5/4/2017 10:15 PM	BBA Reviewers Scores Import - 2017_05_04-22_15
5/4/2017 3:30 PM	BBA Reviewers Scores Import - 2017_05_04-15_30
5/4/2017 3:15 PM	BBA Reviewers Scores Import - 2017_05_04-15_15
5/4/2017 3:01 PM	BBA Reviewers Scores Import - 2017_05_04-15_00
5/4/2017 2:48 PM	BBA Reviewers Scores Import - 2017_05_04-14_47
5/4/2017 2:45 PM	BBA Reviewers Scores Import - 2017_05_04-14_45

2. Update the **Received On** field in the advanced find details with the **Created On** date of the import.

The screenshot shows the Dynamics 365 Advanced Find interface. The 'Look for' dropdown is set to 'People'. The filter criteria are as follows:

- Status: Equals Active
- Prospective Student: Equals Yes
- Prospect Sub-Role: Equals Lead
- Last Name: Does Not Contain subtest
- Lead Initial Source: Equals Data Import
- Lead Status: Equals 0-Not Validated-1-Validated

The 'Lead Interests (Contacts)' section is expanded, showing the following filter:

- Received On: On [5/24/2017 12:45 PM] (The date and time are highlighted with a red box)
- Source: Equals Role: Data Import
- Lead Interest Status: Equals Current

3. **Save the query.** Update each saved view with the date, as necessary.
4. Review and analyze the contact data.

You can use the Dashboard view for comparison of these lists, and review contacts that have been active opening and/or clicking links in emails in the last 3 months. You may elect to contact those people that have email activity over the last 3 months.

Dashboard

Leads: Data Import Interest Expire For Review

This dashboard brings in the views above and shows which data import lists will be expiring in the next 30 days.

Leads: Data Import Interest Expire... ▾

Admin: Data Import Interest Expire (Change Date, Review) ▾

Search for records:

Created On	Last Interest C...	Lead Last Acti...	Full Name	Lead Status	Lead Initial So...	Email Template	Next Ter...	Lead...	Engagement	Lead Reg...	Lead Inte...	Lead UR...
9/25/2014 3:51 ...	11/18/2015 5:5...	9/28/2015 9:33 ...	[REDACTED]	1-Validated	Data Import	MBA-FT	Fall 2017	1	Midwest	No	No	

Data Import Lists Expiring Next 30 days ▾

Search for records:

Name	Created On
Expire Import: 145 - FTMBA-Inq-GMASS - APRIL 2015...	4/18/2016 4:02 AM
Lead Import: 449 - FTMBA-Inq-Economist - 2016_4_21	4/22/2016 12:07 AM
Lead Import: 450 - EEMBA-EV-Inq-Economist - 2016_...	4/22/2016 12:07 AM
Lead Import: 451 - FTMBA-Inq-ConsortiumMAPS - CG...	4/23/2016 12:05 AM
Lead Import: 452 - FTMBA-Inq-Economist - 2016_4_28	4/28/2016 12:06 AM
Lead Import: 453 - EEMBA-Inq-Economist - 2016_...	4/28/2016 12:06 AM
Lead Import: 454 - FTMBA-Inq-ConsortiumMAPS - CG...	4/30/2016 12:05 AM
Expire Import: 146 - EEMBA-EV-Inq-DCS - Evening M...	4/30/2016 4:00 AM
Lead Import: 455 - FTMBA-Inq-GMASS-Arts - FTMBA...	5/4/2016 12:05 AM
Lead Import: 456 - FTMBA-Inq-GMASS-ASAP - FTMB...	5/4/2016 12:06 AM
Lead Import: 457 - FTMBA-Inq-GMASS-Finance - FTM...	5/4/2016 12:29 AM
Lead Import: 458 - FTMBA-Inq-GMASS-Marketing - F...	5/4/2016 1:33 AM
Lead Import: 459 - FTMBA-Inq-GMASS-OTM - FTMBA...	5/4/2016 1:41 AM
Lead Import: 460 - FTMBA-Inq-GMASS-RE - FTMBA R...	5/4/2016 1:43 AM
Lead Import: 461 - FTMBA-Inq-GMASS-SCM - FTMBA...	5/4/2016 1:45 AM
Lead Import: 462 - FTMBA-Inq-GMASS-SHRM - FTM...	5/4/2016 1:48 AM
Expire Import: 147 - FTMBA-Inq-PQ - 2015_5_4	5/5/2016 4:00 AM
Lead Import: 463 - FTMBA-Inq-ConsortiumMAPS - CG...	5/7/2016 12:06 AM
Expire Import: 148 - FTMBA-Inq-Veterans - Washing...	5/12/2016 4:00 AM
Lead Import: 464 - FTMBA-Inq-GMAT - GMAT April 20...	5/13/2016 12:09 AM
Lead Import: 465 - FTMBA-Inq-Economist - 2016_5_17	5/18/2016 12:08 AM
Lead Import: 466 - EEMBA-EV-Inq-Economist - 2016_...	5/18/2016 12:09 AM
Lead Import: 467 - EEMBA-EV-Inq-Economist - 2016_...	5/18/2016 12:09 AM
Lead Import: 468 - EEMBA-EV-Inq-GMASS - 2016_5_17	5/18/2016 12:10 AM

How can I view the result of an import expiration?

View the **Expire Import Logs** to see the result of the data import interest expire workflow.

➔ Expire Import Logs ▾

Created On	Name
10/9/2015 2:46 PM	Expire Import: 293 - FTMBA-Inq-GMASS-Arts - Day 1C2 - ...
10/9/2015 2:46 PM	Expire Import: 294 - EEMBA-TEST-Evening Interest - Day 1...
10/9/2015 2:46 PM	Expire Import: 292 - FTMBA-Inq-GMASS-Arts - Day 1C1 - ...
10/9/2015 2:30 PM	Expire Import: 290 - FTMBA: GMASS Import - Day 1A - 20...

Similar to the **Lead Import Logs**, the expire log describes the result from the import expire workflow.

- "previously set to inactive" - this contact was previously set to inactive (likely after unsubscribing)
- "set to inactive by list expiration" - this contact was set to inactive by the list expire workflow
- contact's current lead status, along with interest status reason: "no import interest found" or "current interests"

i Tip

Best practice would be to review expire logs after each expire is completed to assess the result.