Import Prospective Student Lists

Use the "Import Prospects" button to import a list of prospects to LRM.

How do I import a new prospect list?
How can I evaluate the prospect list after import? (For example, I want to see how many names on the list already existed in the system.)

Data Import Process

Users must have the **data import security role** on their user account to import prospects.

If you have permissions to import prospects, you will see an "Import Prospects" button when you look at the People screen.

1. Navigate to Workplace > Contacts, select "Import Prospects" Button

2. Webpage opens with import instructions and the required excel import template. Review the **Data Instructions** tab on the excel file for more information.
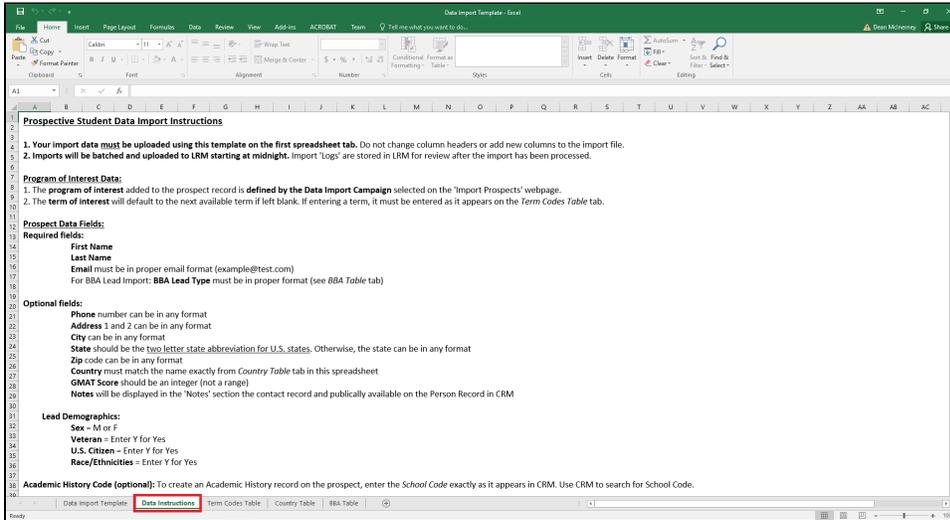
3. Select the appropriate **Data Import Campaign** from the drop down selections. The data import campaign selected here will add a **specific program interest** (defined by the campaign) to every prospect on the import list. To create a new Data Import campaign, follow these instructions.

4. Enter a **Date** (required). This date is usually the list received date, purchased date, event date, or other date as defined by your office process. The date can be used to query the list of prospects in the system after upload is completed.

5. Enter a **Location** (optional). This is an open text field, so you can enter any text into this box. The location can be used to query the list of prospects in the system after the upload is completed.

> ✅ **Tip:** Be consistent with the text you enter in this field, if you plan to query on this field over time.

6. Check **Import as Validated** if this campaign should pull in prospective students as validated leads. Leaving this unchecked will not override campaigns which are already set to Validated, only those set to Not Validated. So it breaks down as follows:
    a. Not validated campaign + button unchecked = Not validated import
    b. Not validated campaign + button checked = Validated import
    c. Validated campaign + button checked = Validated import
    d. Validated campaign + button unchecked = Validated import
7. Upload **Data Import File**. You must use the template format to upload your list.
    a. **Required Fields for Data Import:** First name, last name and email.
    b. **Term of Interest:** If no term is entered in the spreadsheet, the term will default to the next available Fall term. The next available Fall term changes every July 1.
    c. **BBA Data Imports:** BBA Lead Type field is required
8. **Imports are processed at daily at midnight.** Prospect records will not be available in the system until the next day after import. If you imported a list in error, contact support.wsb.wisc.edu with an URGENT request, and the import can be deleted from the queue before being processed at midnight.

Data Import Logs

You can view the result of your data import in the "Logs" section of the LRM.
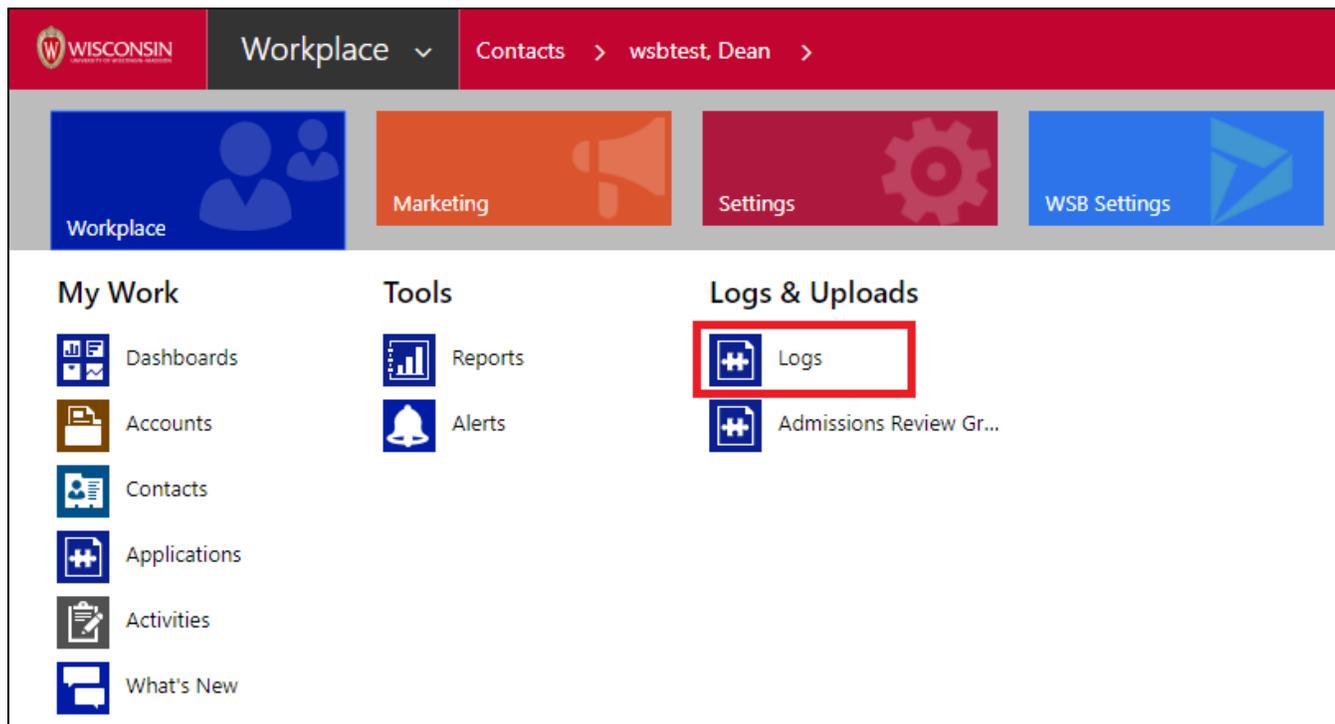
Import Logs are named with the campaign name, location and date fields entered when initiating the import.

The import logs include summary information on the following:

- Create (new), Match (existing) or Suspend (error occurred) record
- Active, Inactive, or Duplicate records found
- Added or Updated Information (Address, Phone, GMAT, Term of Interest)
- Resulting 'Lead Status' of the record
- Import Result

ⓘ **Tip:** Best practice would be to review import logs after each import is completed to assess the result of the import.