

### Three Minute Tech Tip - # 43 August 2, 2006

Several of our tech-savvy associates ask: "I was wondering if there was any way to import my contacts from another program into LeadStreet on my regional web site." Troy Murphy wanted to address this with everyone so he has provided the following instructions.

#### **Today's Tech Tip: Add your Existing Contacts to LeadStreet Marketing**

The answer has been yes for some time, but you may not be aware of how fast and easy it can be. Recently an agent who came over from a competitor contacted me about importing her 2,000 contacts into the site. It took all of 5 minutes to do and not only did it import them, it also activated them as web clients so as to allow them full access to the My Home Finder functions and even allowed the agent to assign them into groups. By default they will already be part of the All Clients and New Clients groups maintained by the system, but you can also assign them to any of the custom groups you have created.

The first step is to export them from their current database into a CSV (Comma Separated Value) format. This can easily be created in Microsoft Excel using the Save-As function. (Unfortunately, our Help Desk will not be able to provide support for the exporting of your current database. We do not provide support on Microsoft products, so we may not have the access or knowledge of the system you are currently using to answer any questions you may have.)

Where we will be able to provide support is on the importing of your database into your CLIENTS area. In fact, there is a HELP module already built into the site that shows you step by step how to import your database using the Contact Upload Wizard. It is accessible from the HELP tab as well as under the Contacts section of the CLIENTS tab.

Once the clients have been imported into the site, you can set them up for automated searches, send them the monthly newsletter and keep track of their activity through the Web Activity section of their profile.

This also guarantees that any time the customer visits the RE/MAX NJ web site, they are already assigned to you and their account is already set up on the system.