Knowledge Base Article

Free Download Real Estate Software - ProGold i2 web site: www.progoldi2.com
Real Estate Search Engine - ViewMyListing.com web site: www.viewmylisting.com
Search Local Classifieds – www.viewmylisting.com/buy-sale-trade
Agent Tools web site: www.viewmylisting9ae.com

Article ID: 4137
Subject: Import Leads to Pro Gold i2 via Top Google Ranking Module Import Wizard
Last Modified: September 9, 2009

Applies to: Top Gggole Ranking Module (powered by ViewMyListing.com), Pro Gold i2 2.0, Pro Gold i2 3.0

Issue: The **Contact Import Wizard** allows multiple contacts to be brought into ProGold i2 from an outside file. For the contacts to be imported, they must be saved in a CSV (Comma Separated Value), Tab or Bar format, typically done through the export function of the outside program. A user with VML Admin privileges can import contacts as a Company (CSC) type which will reverse synchronize back into the Pro Gold i2 database. Agent assignment is based on the Agent Connector account the contacts are imported under. Lead assignment can be accomplished as you import by exporting contact files in existing system (e.g., spreadsheet) by individual agent and importing that file using that particular agent's ViewMyListing.com account or export all leads in one file import, use one Agent ViewMyListing.com account and re-assign once the contacts are in ProGold i2. The preferred option is to export your files by individual agent.

Resolution: The following steps describe importing company leads by individual agent. Highly recommend use of field names in the first row of the export file to facilitate mapping the import fields.

- Export files by "agent" in your existing system (Facilitates agent assignment)
- Use a Comma Separated Value (CSV), Tab or Bar format
- Go to Agent record in Pro Gold i2 check the VML Admin box in the ViewMyLising.com Information section on the General Tab
- Click Done and go to the Setup Tab and open the Viewmylistings.com Icon
- Select the "Synchronize Now" button (Assigns VML Admin status to the agent's ViewMyListing.com account)
- Return to agent's record and select the VML Logon button to login to the agent's ViewMyListing.com account
- Go to Contacts Tab and select the Contact Import Wizard Icon
    - Page 11 in the VML manual contains the detailed import instructions
    - Note: **Be sure to select "Company" in the Personal/Company Type field**
- Once the import is finished, re-synchronize from ProGold i2
- Go to Contacts (Prospects) Tab in Pro Gold
- Open Contact Manager Professional (Work With Prospects) Icon to search for a lead to confirm (can run Contacts/Prospects by Agent report under Reports to verify total import success)
- Return to agent record and remove the check from the VML Admin box in the VML Tab
- You will need to repeat this step for each agent

References: Page 11 in ViewMyListing.com 2009 User Training Guide

Below is a link you can use to access Enhancement HelpNet Center resources, which includes the Knowledge Base Article (KBA) Library, Pro Gold i2 Documentation, and Training Webcasts:

http://secured.progoldi2.com

- The Enhancement HelpNet links are located on the right side of the web page.

Related articles: N/A

Information deemed reliable, but not guaranteed. Taro Systems, Inc. makes every reasonable effort to ensure its accuracy.
Proprietary Information Protected by Taro Network of Companies, Copyright © 2007 Taro Systems, Inc.

Keywords: Import Wizard, Agent Connector, Contacts, Leads, Prospects, 4137