

# Importing Prospects from WebLeads Connect

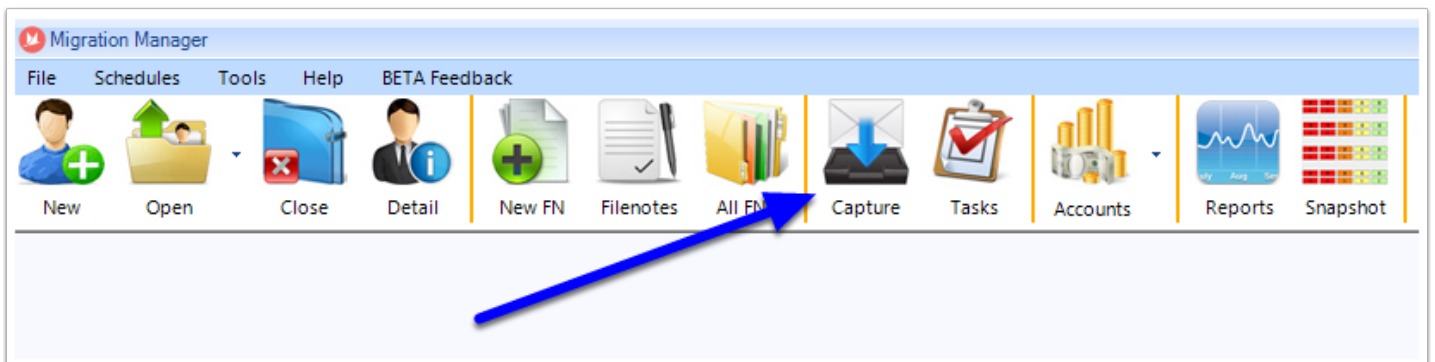
Once you have completed [setup of WebLeads Connect](#), any incoming emails which are captured and deemed to be a WebLead will flow into the WebLeads system ready to be imported as a Prospect Matter.

**i** Note: WebLeads are captured via Email Capture. If you have not yet activated and configured Email Capture, then follows the topics in the [Email and Capture Settings](#) chapter.

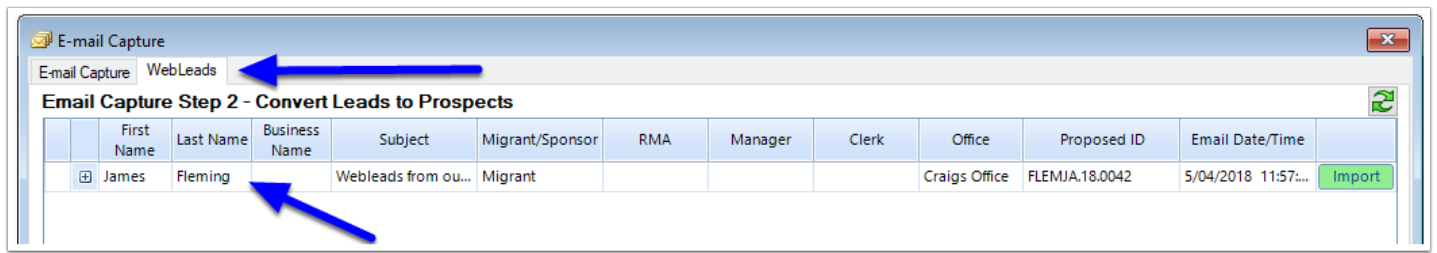
## 1. When an email is captured and is deemed a WebLead, it is transferred to the WebLeads System

## 2. Processing the WebLead via Email Capture

1. Click the **Capture** button on the Main Toolbar

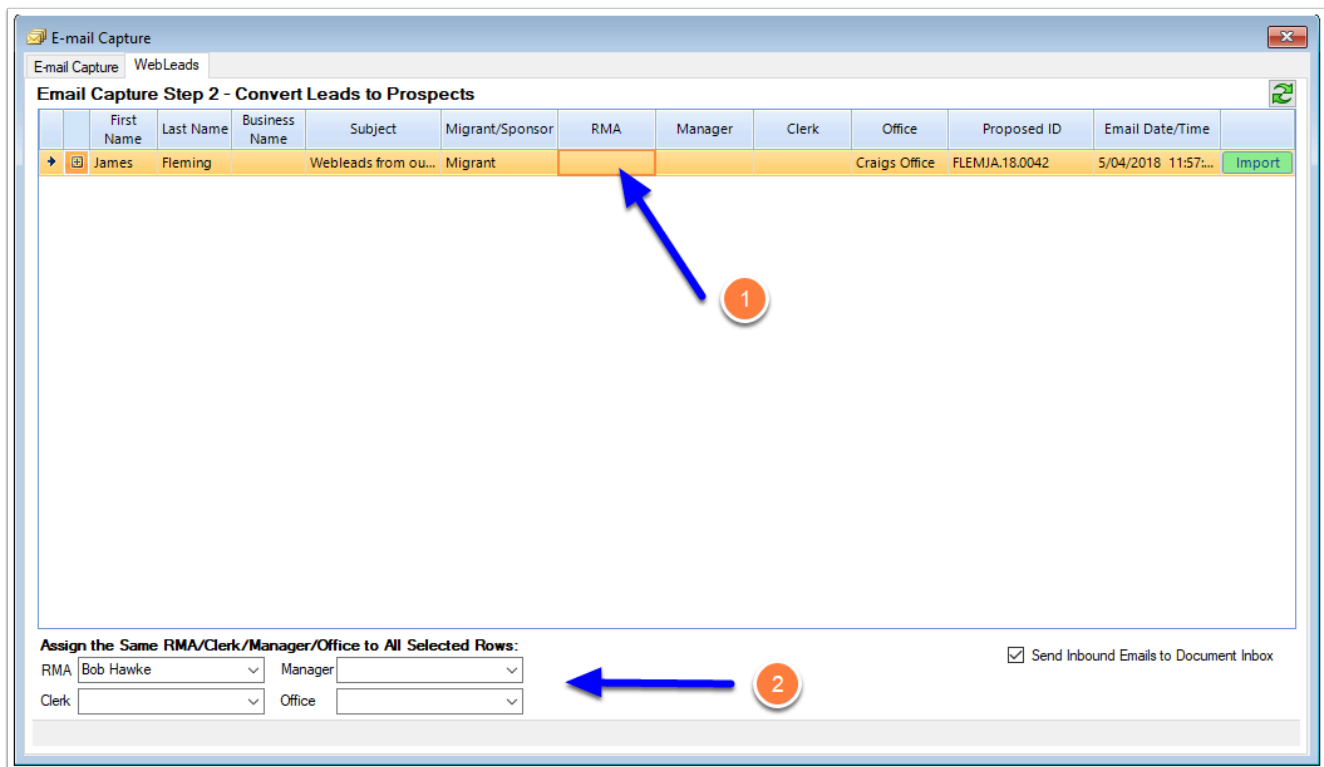


2. When E-mail Capture opens, select the **WebLeads** tab. Here you will see any WebLeads that have arrived



3. You can assign an **RMA, Manager, Clerk** and **Office** either by:

- Double clicking the **RMA, Manager, Clerk** or **Office** field on the WebLead row you are working on (1)
- Highlighting the WebLead, then select the **RMA, Manager, Clerk** and **Office** from the dropdown selection in the bottom left window (2)



4. You can expand and view the details of the WebLead by clicking on the **+ expand** button next to the WebLead row

**Email Capture Step 2 - Convert Leads to Prospects**

	First Name	Last Name	Business Name	Subject	Migrant/Sponsor	RMA	Manager	Clerk	Office	Proposed ID	Email Date/Time	
+	James	Fleming		Webleads from ou...	Migrant				Craigs Office	FLEMJA.18.0042	5/04/2018 11:57...	Import

Information	Value
Date of Birth	26/01/1988
Passport Number	United Kingdom
Email	james@iwanttomigrate.com
Home Phone - Phone Number	92280111
Mobile Phone	0408883999
Current Visa	572
Visa Expiry Date	09/12/2018
Occupation	Hair Dresser
Country of Passport	United Kingdom
Comments	I am currently in Australia on a student Visa and I would like to know about 4...

**Assign the Same RMA/Clerk/Manager/Office to All Selected Rows:**

RMA: Bob Hawke    Manager:    ☒ Send Inbound Emails to Document Inbox

Clerk:    Office:   

5. You can also change the **First Name**, **Last Name**, **Business Name**, whether the WebLead is a **Migrant** or **Sponsor** and the Proposed **Matter ID** by double clicking in the field for that row

**Email Capture Step 2 - Convert Leads to Prospects**

	First Name	Last Name	Business Name	Subject	Migrant/Sponsor	RMA	Manager	Clerk	Office	Proposed ID	Email Date/Time	
+	James	Fleming		Webleads from ou...	Migrant				Craigs Office	FLEMJA.18.0042	5/04/2018 11:57...	Import

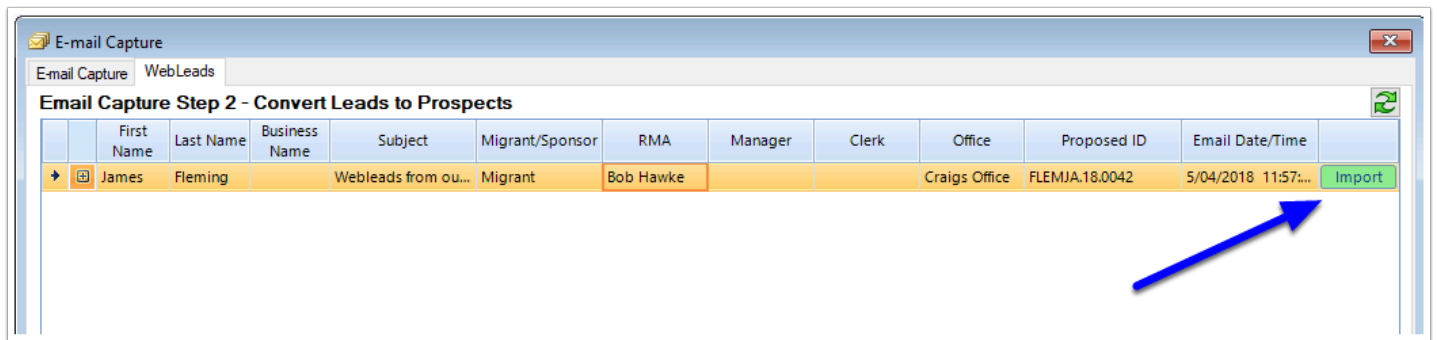
  

**Assign the Same RMA/Clerk/Manager/Office to All Selected Rows:**

RMA:    Manager:    ☒ Send Inbound Emails to Document Inbox

Clerk:    Office:   

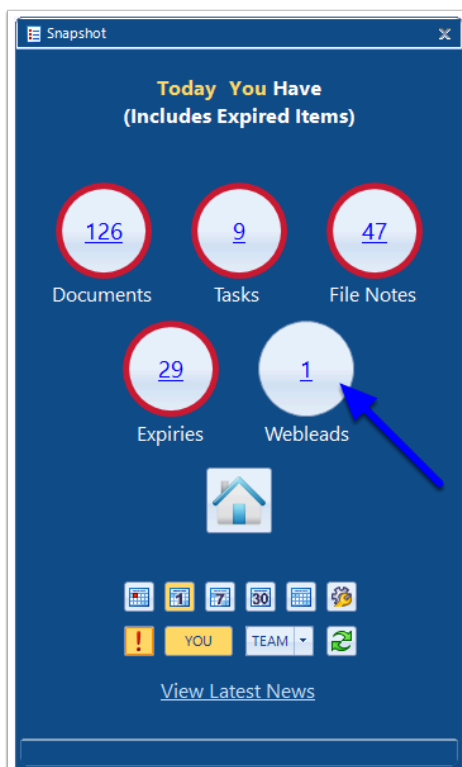
6. Once you are satisfied with the row, simply click the **Import** button to create the Matter



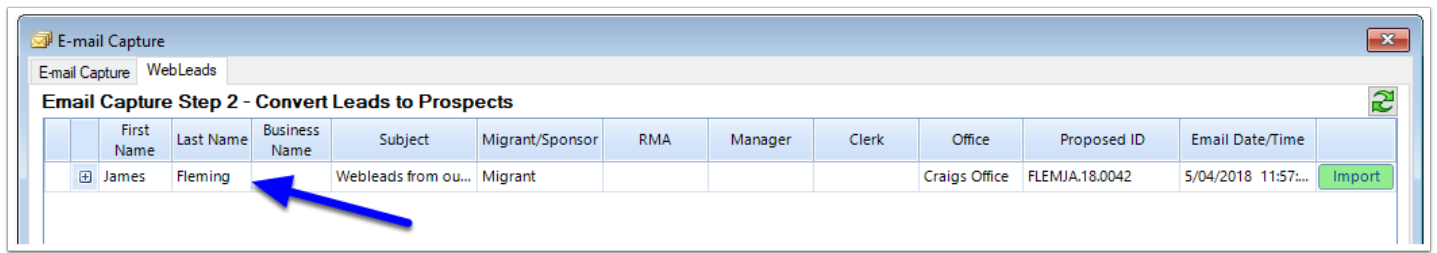
**Note:** When the Prospect is imported, the original email containing the WebLead detail is also saved to the **Documents** tab of the Prospect Matter for future reference

### 3. Processing the WebLead via Snapshot

1. When an WebLead arrives via Email Capture, it is also shown in the **Snapshot** window. Click on the **Number** within the WebLeads circle to view WebLeads

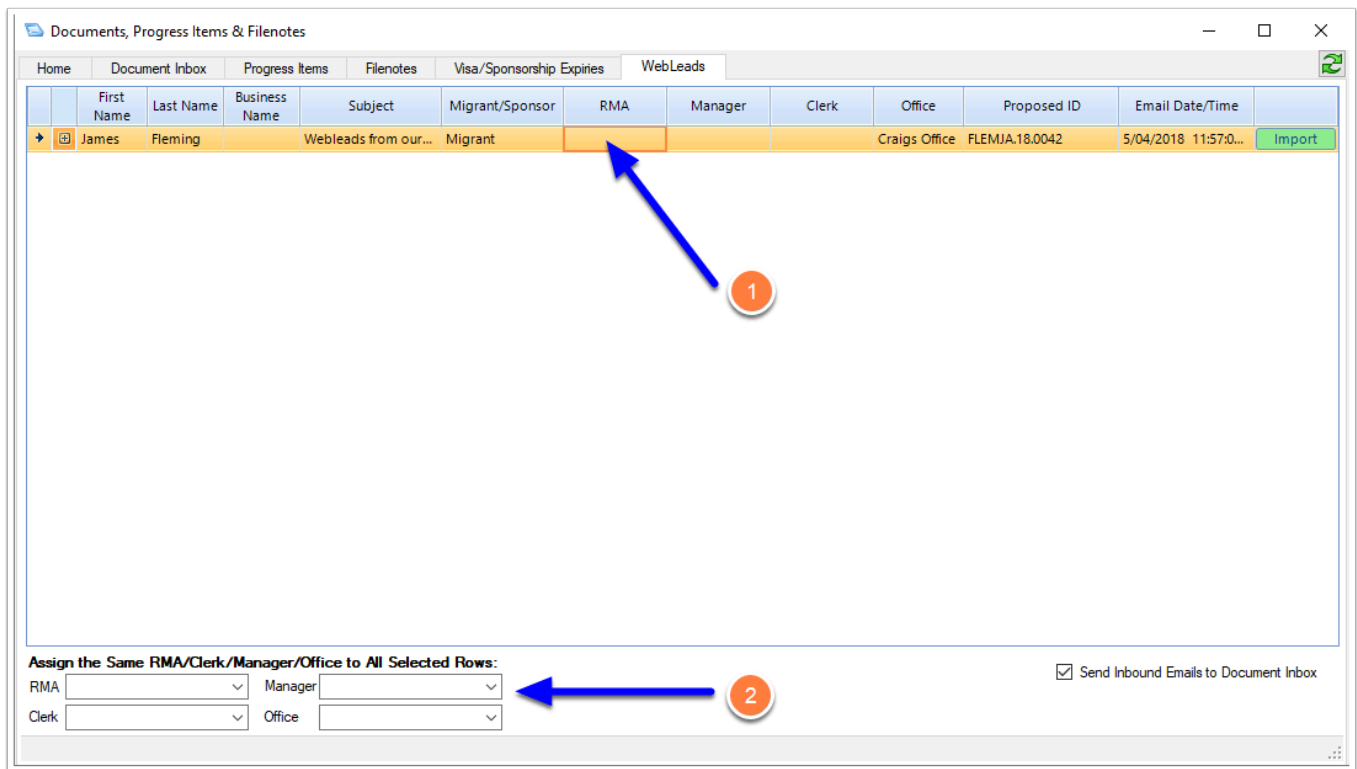


2. Here you will see your active WebLeads



3. You can assign an **RMA, Manager, Clerk** and **Office** either by:

- Double clicking the **RMA, Manager, Clerk** or **Office** field on the WebLead row you are working on (1)
- Highlighting the WebLead, then select the **RMA, Manager, Clerk** and **Office** from the dropdown selection in the bottom left window (2)



4. You can expand and view the details of the WebLead by clicking on the **+ expand** button next to the WebLead row

Documents, Progress Items & Filenotes

Home Document Inbox Progress Items Filenotes Visa/Sponsorship Expiries WebLeads

	First Name	Last Name	Business Name	Subject	Migrant/Sponsor	RMA	Manager	Clerk	Office	Proposed ID	Email Date/Time	
James	Fleming		Webleads from our...	Migrant					Craigs Office	FLEMJA,18.0042	5/04/2018 11:57:0...	Import

Information

Value

Date of Birth26/01/1988  
Passport NumberUnited Kingdom  
Emailjames@iwanttomigrate.com  
Home Phone - Phone Number92280111  
Mobile Phone0408883999  
Current Visa572  
Visa Expiry Date09/12/2018  
OccupationHair Dresser  
Country of PassportUnited Kingdom  
CommentsI am currently in Australia on a student Visa and I would like to know about 4...

Assign the Same RMA/Clerk/Manager/Office to All Selected Rows:

RMA  Manager

Clerk  Office

☒ Send Inbound Emails to Document Inbox

5. You can also change the **First Name**, **Last Name**, **Business Name**, whether the WebLead is a **Migrant** or **Sponsor** and the Proposed **Matter ID** by double clicking in the field for that row

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→ ⓘ	James	Fleming		Webleads from our...	Migrant				Craigs Office	FLEMJA.18.0042	5/04/2018 11:57:0...	Import



**i** Note: When the Prospect is imported, the original email containing the WebLead detail is also saved to the **Documents** tab of the Prospect Matter for future reference