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.

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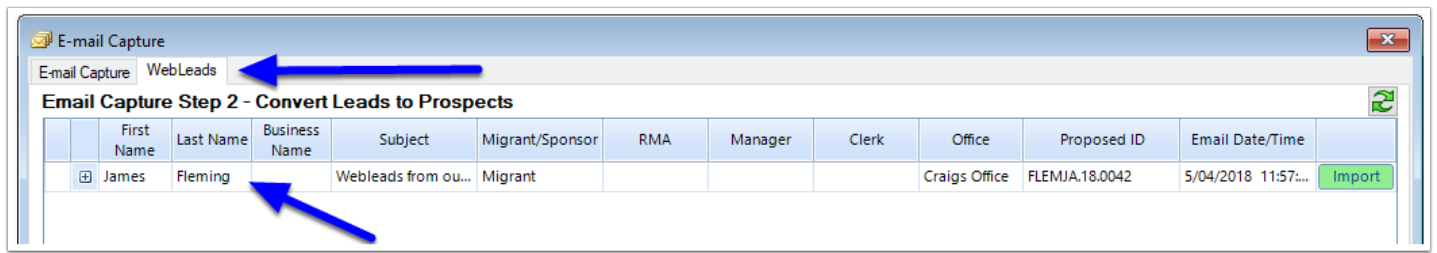
1. When an email is captured and is deemed a WebLead, it is transferred to the WebLeads System

2. Processing the WebLead via Email Capture

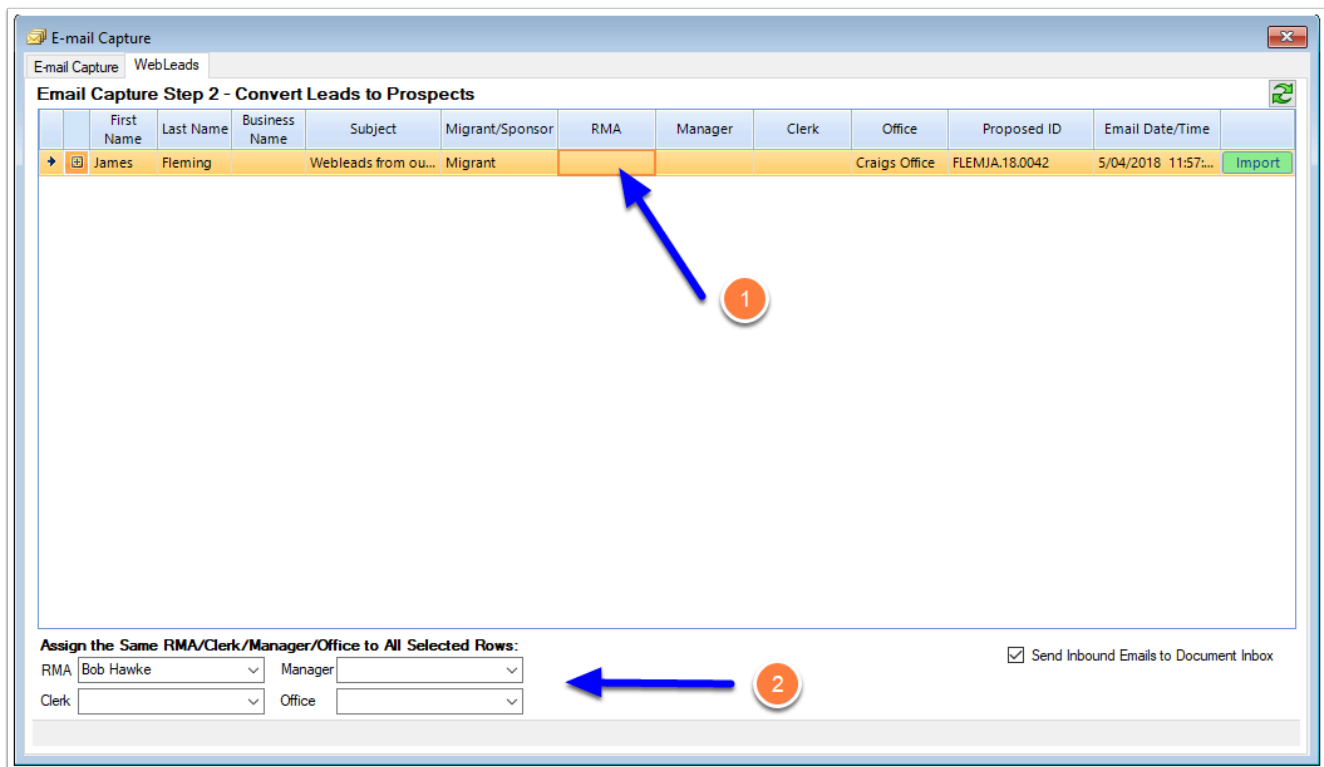1. Click the **Capture** button on the Main Toolbar
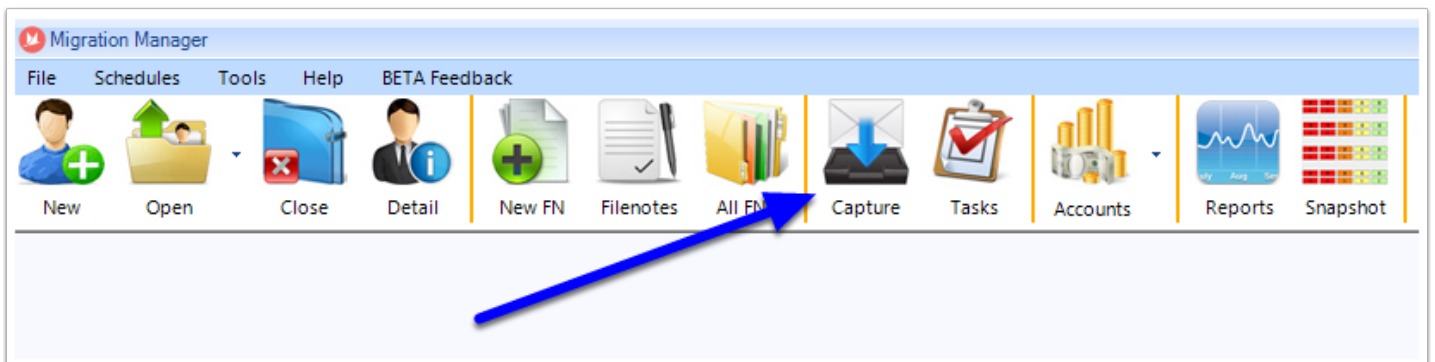
2. When E-mail Capture opens, select the **WebLeads** tab. Here you will see any WebLeads that have arrived

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

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


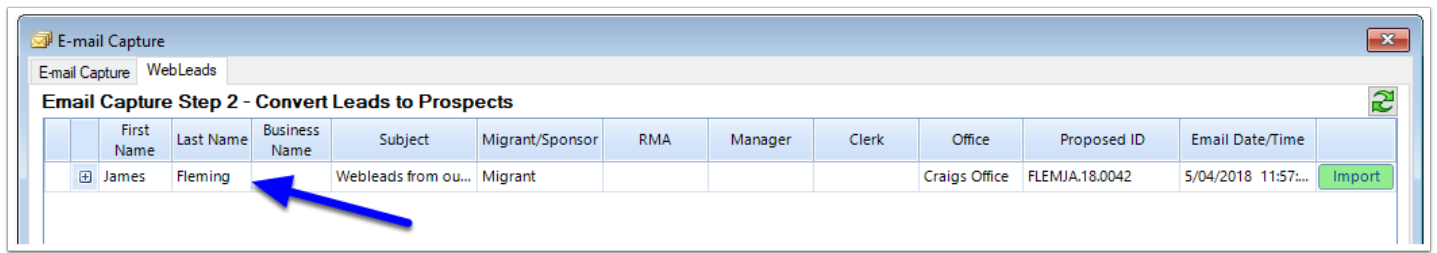6. Once you are satisfied with the row, simply click the **Import** button to create the Matter

> ℹ️ 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
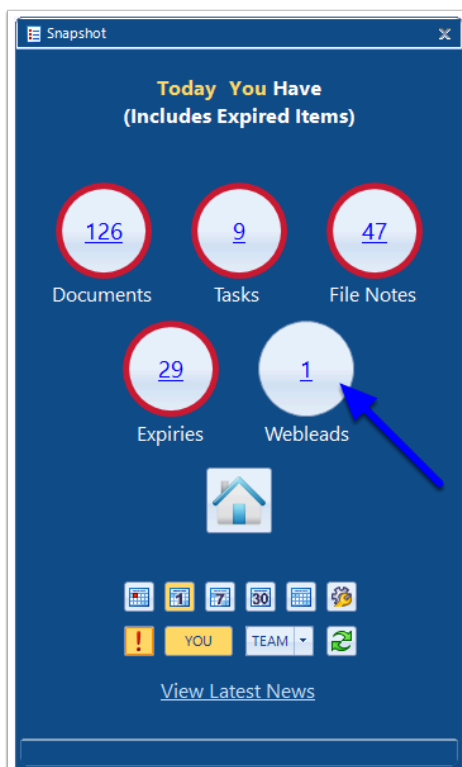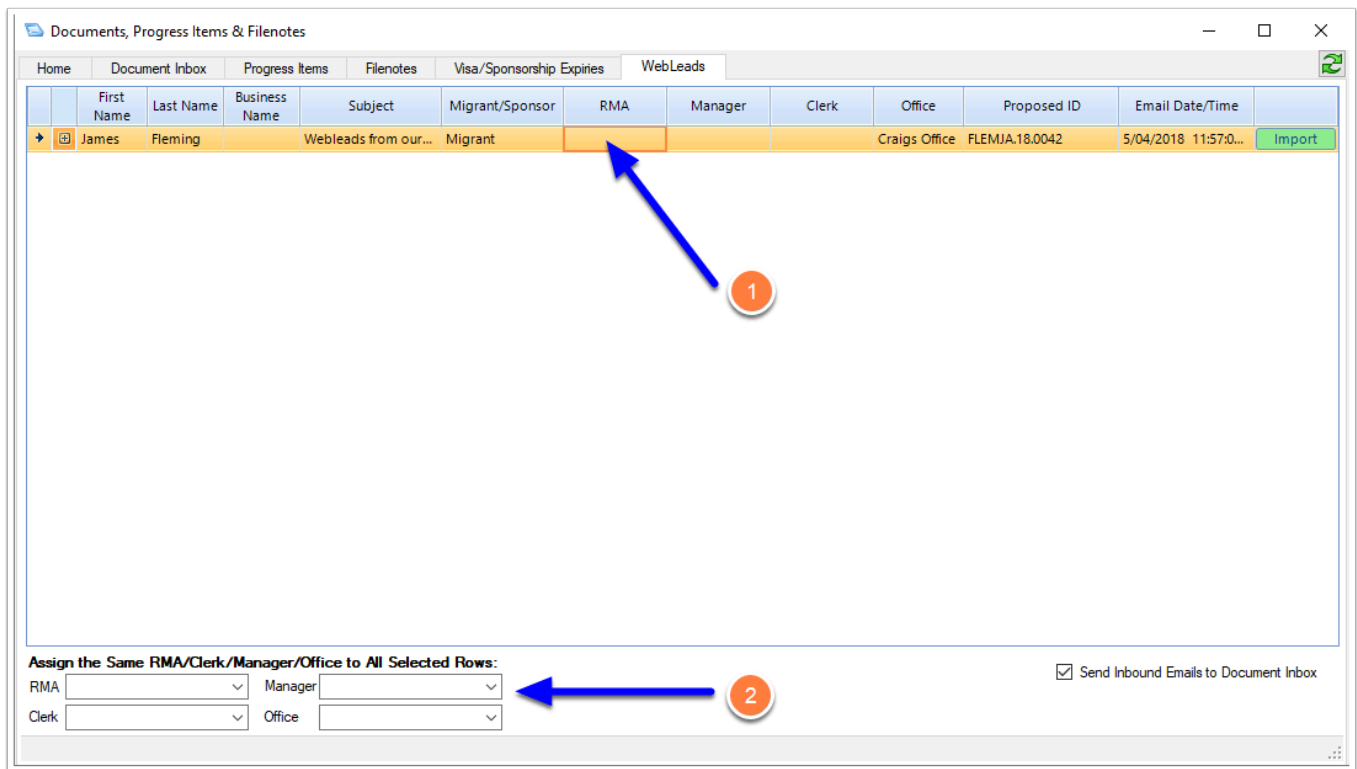

2. Here you will see your active WebLeads

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

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

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