

## ARAHANT - STANDARD PROSPECT IMPORT

### General Information

Arahan's Client Relationship Management module includes a dynamic import for client and prospect data. By importing a formatted .CSV file, Arahan can populate the user's database with clients and prospects based on the information within the .CSV file.

The client and prospect information can be initially created within a spreadsheet program such as Microsoft Excel or OpenOffice. However, once the information on the spreadsheet is in place, the file must be saved or exported as a .CSV file (text conversion format for spreadsheets). Arahan will read in this .CSV file and dynamically determine which fields to populate data with based on a column header recognition algorithm. As long as the column headers are intuitively named, Arahan will know where to put the data.

### Column Title Examples

While Arahan will dynamically recognize column titles, they do need to be intuitively named after their desired purpose. Listed below are a number of examples for column header titles and a description of their purposes. These are often used headers that are recommended. However, they act only as examples and a guide, and the user can choose to use as many columns as they need, placed in any order that they wish. Any column which Arahan does not recognize will still be stored in the database as additional prospect company details so that no information is lost in the import. Also included in the module is a template .CSV file that the user can utilize.

*Format: **Column Name** - Description*

**Company Name** - Name of prospect company

**Web Site/URL** - URL of company website, if applicable

**HQ Address 1 / Street** - Street address of prospect company

**HQ City** - City of prospect company

**HQ State/Prov/Reg** - State, province or region of prospect company

**HQ Zip** - Zip Code

**HQ Country** - Country of prospect company

**GEO City** - City of prospect company's branch, if applicable

**GEO State/Prov/Reg** - State, province or region of prospect company's branch, if applicable

**GEO Country** - Country of prospect company, if applicable

**Parent Company** - Parent company of prospect company, if applicable

**Industry** - Industry that prospect company is in

**Primary SICs/SIC Code** - SIC code(s) for prospect company

**Company Size** - Number of employees in prospect company

**Revenue** - Annual revenue of prospect company (millions)

**Contact Last Name** - Last name of primary contact for prospect company

**Contact First Name** - First name of primary contact for prospect company

**Contact Job Title** - Job title of primary contact for prospect company

**Contact Email** - Email address of primary contact for prospect company.

**Phone** - Primary phone number of main contact or main office

**Extension** - Phone extension of primary contact, if applicable

**Fax Number** - Fax number of primary contact/prospect company, if applicable

**Apartment/Suite** - Apartment or suite number of prospect company, if applicable