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# Import Excel File

## Rename Columns

To prepare the client supplied excel file for importing, we need to rename some of the columns.

|  |  |  |
| --- | --- | --- |
| **Column Name** | **Rename To** | **Description** |
| TRACK ID |  | Client assigned tracking id for the contact. This should be referenced in all communication with the client regarding this contact. |
| COMPANY NAME |  | The company for which this contact works. |
| NAME | First NAME | InstaVeritas supplies full name in this column. In later steps we will split it into first name and last name. |
| FATHER NAME |  |  |
| MOBILE NUMBER | MOBILE PHONE NUMBER |  |
| ADDRESS | FULL ADDRESS | The client supplies the full address in this column. Our field agents will use this information to reach the address and will then use the Hubspot app to fill in Street, City and State columns. |
| LANDMARK |  |  |
| STATE |  |  |
| DISTRICT |  |  |
| PINCODE | POSTAL CODE |  |
| REFERENCE NAME |  |  |
| REFERENCE RELATION |  |  |
| REFERENCE NUMBER |  |  |
| CLIENT REMARKS | MESSAGE |  |

## Split name into first name and last name

1. Insert 3 columns after the name column (which has now been renamed to first name).
2. Select first name column
3. Choose menu Data -> Text To Columns. Wizard Page 1 Keep default Delimited. Page 2 Select Space as delimiter. Click Finish.
4. You will notice that the name column now contains the first name only. The newly inserted columns contain other parts of the name. BUG: Will not work if the name contains more than three words.
5. Now we want to merge the middle name with the last name. Do this manually by pasting the middle name in the last name column. Then delete the middle name column.

## Create the E-mail Column

Each contact must have a unique e-mail address. For InstaVeritas we accomplish this by using [TrackId.CaseType@instaveritas.com](mailto:TrackId.CaseType@instaveritas.com) format.

1. Insert a new column after the TRACK ID column (Column A). Set this formula in the first data row of the new column B:

=CONCAT(A2, ".", I2, "@instaveritas.com") -> OLL206588.current@instaveritas.com

1. Copy this formula to other data rows of column B. Set the header to EMAIL

## Start the Hubspot Import Process

Save the excel file as .csv file and start the import process. If you have named the columns as recommended above, the import process should automatically map all excel columns to Hubspot columns. The csv file used for importing is saved by Hubspot and can be retrieved later, if necessary.

The process can be started from here: <https://app.hubspot.com/import/4463928/new-import>

# SOP for Verifying HubSpot Contacts

## Assign contact to field agent

## Alert field agent to verify contact

After assigning cases to particular field agent, verification executive has to call and inform them about their cases. Follow ups after every few hour through telephone is done to ensure that the field agents are working.

## Complete verification in Hubspot

«First\_Name» «Last\_Name»

«Track\_ID»

«Street\_Address», «City»,

«Fathers\_Name»

«Fathers\_Phone\_Number»

«Verifier\_Name» «Verifier\_Phone» «Verifier\_Relation»

«reference\_name», «reference\_number», «reference\_relation»

«Ownership\_Status», «Period\_of\_Stay», «Verification\_Comments», «Type\_Of\_Address\_»

«Google\_Location»

«Contact\_owner»

«Verification\_Complete\_Date»

## Send email to client

After sending email, update the close date of all contacts for which email has been sent.

### When the process is done through Hubspot

The verification executive goes to the email section, click on the options menu and export the list of clients to which the email is to be sent.

Once the report is downloaded from the Hubspot, the executive has to follow the mail merge process for sending out the email.

### When the process is done manually

When all the details are received by the executive, compilation and quality checks are being performed and the report is emailed to the client

To do (mail merge process)

To do (include manual + hubspot part)

## Add verified contacts to invoice deal

Post completion of the case, deal is added to every contact so that the billing process is streamlined