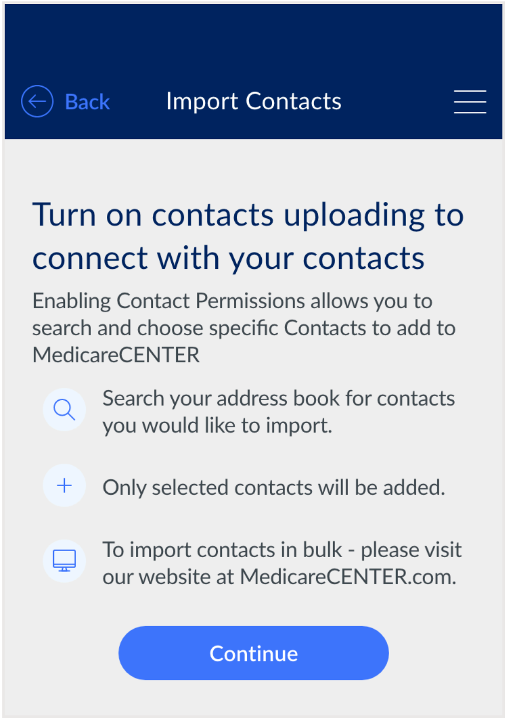
Creating Contacts

Integrity delivers a powerful, streamlined solution for managing the most important part of an agent's business: their Contacts. Agents can create and maintain client relationships from leads through sales, including renewals and cross-sell opportunities.



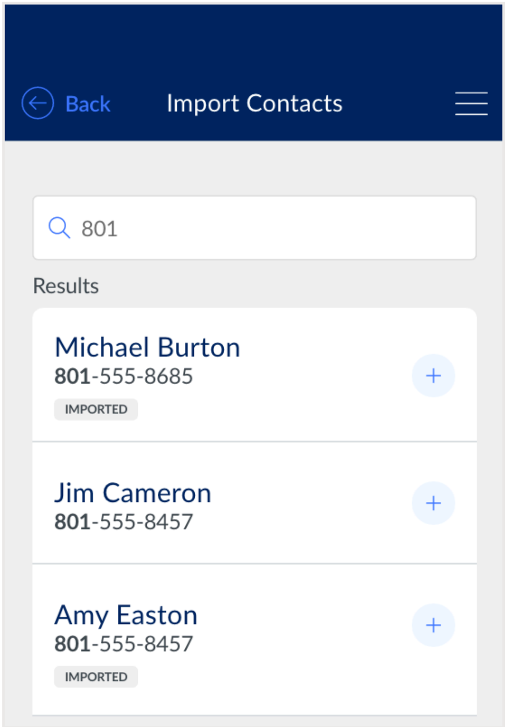
Importing and Creating Contacts

Contacts can be imported or added manually. Contacts can be added in four main ways:

- Bulk Import
- One Contact at a Time
- LeadCENTER Campaigns
- Mobile Device Import

Bulk Contact Import

To import a list of Contacts, click Contacts, then click the Import button. The Contact Import screen shows the list of fields available for import and provides a Comma Separated Values (.csv) template if needed. It also shows instructions for saving a .csv and uploading it.



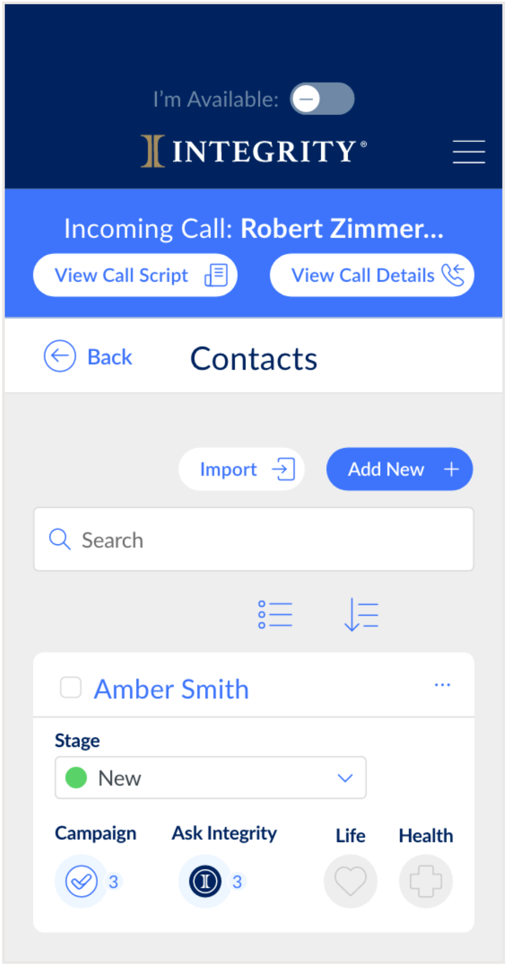
Once the .csv file has been added through file browser or drag-and-drop, the columns in the .csv file need to be dragged and dropped to match the fields below. For example, if a column in the .csv has the clients' first names it would need to be dragged to the First Name field.

When the import is complete, the Contact Import screen will show the number of records that were added successfully, as well as any that weren't added because of errors like duplicates. To complete the import process and go back to the Contacts screen, click Finish. There is no limit to the number of files that can be imported.

Creating Contacts

One Contact at a Time

To add a single Contact without importing, click the Add Contact button on the Contacts screen. The Contact Details screen will be shown next and lists the fields that can be filled out. The only fields that are required to create a Contact are first name, last name, and either phone number or email address. More than one Contact can share the same phone or email if they have different first names or last names. For example, husband and wife John Smith and Jane Smith will each have their own Contact record and can share a phone number or email address.



LeadCENTER Campaigns

Leads that are purchased in LeadCENTER are delivered directly to Integrity as Contacts, including all contact information available from the leads.

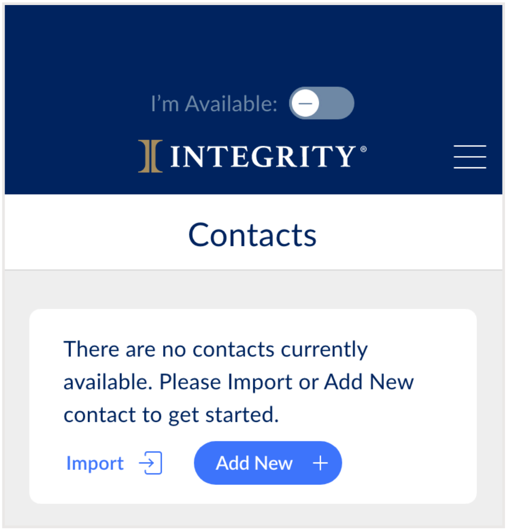
Lead campaign management is still done in LeadCENTER.

Mobile Device Contact Import

Agents who download the Integrity mobile app can import Contacts directly from their iOS or Android device. The mobile app is available from the App Store and Play Store.

Tap to the Contacts screen and then tap the Import button. The agent will only need to accept Contact-sharing permissions the first time they import a Contact, and they can update the permission anytime in their device Settings.

Contacts imported from the Integrity Mobile App are added on a one-time, one-contact basis – and only the specific Contacts that an agent selects will be added to their Integrity Contacts.



Creating Contacts

Contacts are synced between the web and mobile apps, so if an agent creates or updates a Contact on the mobile app, the update is also made on the web – and vice versa.

If the agent updates the Contact on their mobile device, though, the Contact information won't be updated in Integrity, and vice versa. The agent will need to make the update in their phone's Contact and in Integrity.