

## IMPORT REQUEST FORM

**Client Name:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Requestor Name:** \_\_\_\_\_

Please email this request along with your data file to [support@saleschain.com](mailto:support@saleschain.com) for processing. *There is a \$25 fee per file, however, depending on file content and format additional charges may apply and will require approval by your account decision maker before import.*

### **File Information:**

EDA                       InfoUSA                       Other \_\_\_\_\_

### **Sales Rep Assignment Information:**

New accounts should be distributed according to:

Rep Assignment Rules       Specific Rep \_\_\_\_\_       Rep Names in file

### **Telemarketing Assignment Information:**

Is telemarketing enabled for new account? YES/NO (please circle one)

If YES, what should next call date be: \_\_\_\_\_

If YES, what telemarketing should be assigned (if blank account will be set to UNASSIGNED)? \_\_\_\_\_

### **Duplicate Checking:**

*When given a file with a source key (for example: an EDA file with an EDA Buyer ID), SalesChain will attempt to match that ID with an existing account in the SalesChain database to prevent account duplication. If that is not possible, SalesChain will attempt to match duplicates using the rules below. If you wish to change the default duplicate search criteria, please enter below.*

First 8 characters of account name: \_\_\_\_\_

**AND** First 8 characters of account street address: \_\_\_\_\_

**OR** Ten characters of phone number: \_\_\_\_\_

If we match to an existing SalesChain account, would you like marketing data updated (SIC Code, vertical class, number of employees, revenue, etc.)? Please note, this will overwrite existing marketing information.

For Customers: YES/NO (please circle one)

For Prospects: YES/NO (please circle one)

### **EDA File Only:**

What date should be used to estimate term dates on competitive equipment (SalesChain estimates 36 months from UCC Date by default)? \_\_\_\_\_