Step 1:

The Sales Rep will take a clear photo of the business cards and send it to the CSR to complete the remaining steps.

Example Photo:



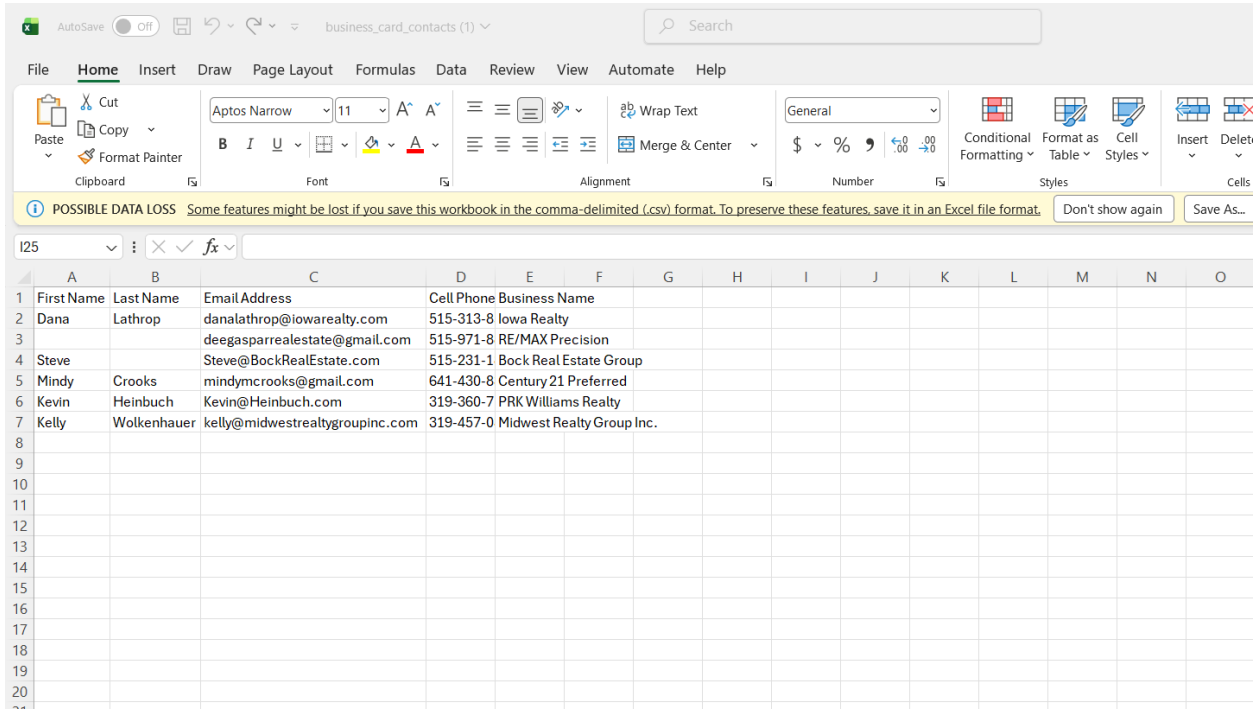
Step 2:

The CSR will upload the photo to Microsoft Copilot and use the prompt below to organize the contact information into a CSV file.

Prompt: “Extract the following information from each business card and organize it into a CSV file with these columns: First Name, Last Name, Email Address, Cell Phone Number, and Business Name. Leave any missing information blank.”

Step 3:

Download the CSV file and review it for accuracy. Fill in any missing information when possible. If additional details are needed, contact the Sales Rep for clarification.



	A	B	C	D	E
1	First Name	Last Name	Email Address	Cell Phone	Business Name
2	Dana	Lathrop	danalathrop@iowarealty.com	515-313-8	Iowa Realty
3			deegasparrealestate@gmail.com	515-971-8	RE/MAX Precision
4	Steve		Steve@BockRealEstate.com	515-231-1	Bock Real Estate Group
5	Mindy	Crooks	mindymcrooks@gmail.com	641-430-8	Century 21 Preferred
6	Kevin	Heinbuch	Kevin@Heinbuch.com	319-360-7	PRK Williams Realty
7	Kelly	Wolkenhauer	kelly@midwestrealtygroupinc.com	319-457-0	Midwest Realty Group Inc.

Step 4:

Upload the completed contact list to the CRM and apply the appropriate tag. Confirm which tag to use with the Sales Rep before uploading to ensure the contacts are added to the correct list or campaign.