

# **Lead Import Guide**

leadBase Software

# It becomes easy for users of leadBase software to import their leads having CSV Format

## IMPORT LEADS

Upload Data

Check Format

Map Fields

To get started, please select the lead group you'd like to import leads into, and select a CSV file containing your leads. You can import up to 20,000 leads in each import. For more detailed instructions on how to import leads, please download our [Lead Import Guide](#) and [CSV Template](#).

Lead Group

Demo Lead Group ▼

Lead Types

Demo Lead Type ▼

Introducer/Source

None ▼

Associated Site

Default ▼

Data to Upload

Choose File No file chosen

Cancel

Continue

**Up to 20,000 leads can be imported at a time. Leads can be imported in CSV format.**

# CSV format

To import leads in CSV Format, create a CSV file with the first line matching the names of the fields you are submitting, and each row containing the corresponding values. The order is not important. A sample CSV file can be downloaded within the 'Import Leads' tool. An example CSV format is shown below:

Title, Author, ISBN13, Pages

1984, George Orwell, 978-0451524935, 268

Animal Farm, George Orwell, 978-0451526342, 144

Brave New World, Aldous Huxley, 978-0060929879, 288

Fahrenheit 451, Ray Bradbury, 978-0345342966, 208

Jane Eyre, Charlotte Brontë, 978-0142437209, 532

Wuthering Heights, Emily Brontë, 978-0141439556, 416

Agnes Grey, Anne Brontë, 978-1593083236, 256

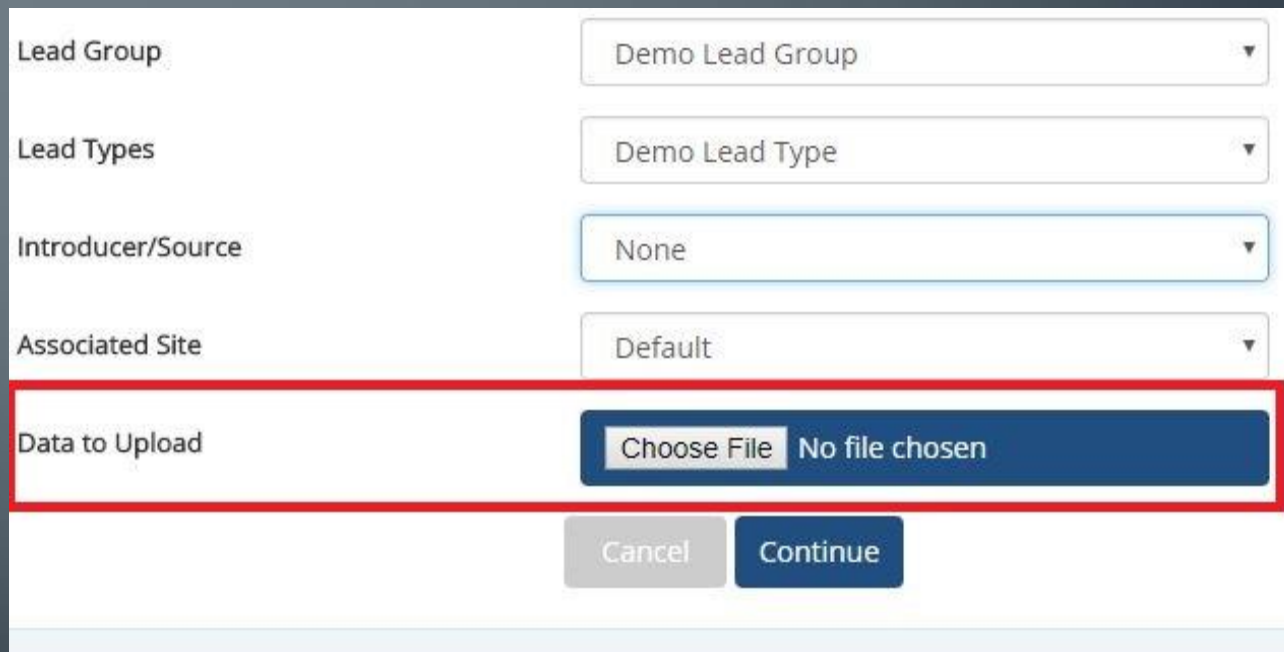
Walden, Henry David Thoreau, 978-1420922615, 156

Walden Two, B. F. Skinner, 978-0872207783, 301

"Eats, Shoots & Leaves", Lynne Truss, 978-1592400874, 209

# How to import CSV file?

After filling other fields, user will import CSV file from Choose File button and his file will be uploaded.



The screenshot shows a web form for importing leads. It contains four dropdown menus: 'Lead Group' (set to 'Demo Lead Group'), 'Lead Types' (set to 'Demo Lead Type'), 'Introducer/Source' (set to 'None'), and 'Associated Site' (set to 'Default'). Below these is a section labeled 'Data to Upload' which is highlighted by a red rectangular box. This section contains a 'Choose File' button and the text 'No file chosen'. At the bottom of the form are two buttons: 'Cancel' and 'Continue'.

Lead Group	Demo Lead Group ▼
Lead Types	Demo Lead Type ▼
Introducer/Source	None ▼
Associated Site	Default ▼
Data to Upload	<div>Choose File No file chosen</div>
<div>Cancel Continue</div>	

# Fields/Elements

- If a CSV file is provided with no header row or field names that do not match the fields in the table below, you will be able to 'map' fields at time of import instead.

Firstname	String	Yes	John	
Lastname	String	Yes	Smith	
Company	String	User	ABC Ltd.	
Jobtitle	String	User	Manager	
Phone1 <sup>3</sup>	Number	User	0161 123 1234	
Phone2 <sup>3</sup>	Number	User	07912 123 456	
Fax <sup>3</sup>	Number	User	0161 123 1235	
Email	String	User	john@abc.com	Must be valid email address
Address	String	User	1 High Street	
Address2	String		This Area	
Address3	String		This Village	
Towncity	String	User	This Town	
Postcode <sup>4</sup>	String	User	BB12 6EG	
Dob	String	User	01/01/1990	Overrides ind. DOB fields
Dobday	Number		01	
Dobmonth	Number		01	
Dobyyear	Number		1990	

# Check Format

Once the data is uploaded, leadBase will check the format

## IMPORT LEADS

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Map Fields

We normally detect the file format correctly, so you can usually just accept the settings below. If you know the data format is different, please fix it before continuing.

Data type

CSV

Field Separator

Comma

Header Row

First Row

Text Delimiter

Double Quote

Start again

Continue



# Map Fields

- After checking format that must be CSV. All the fields will be mapped in drop down.

## IMPORT LEADS

Upload Data

Check Format

Map Fields

We need to know how fields in the lead group match up to fields in the file. Some fields are mapped up automatically because of how they are named, but you might need to add or change some mappings.

### General

IP Address	[No Value]
Created At	[No Value]
Reference	1
Status	Eldon Base for stackable storage shelf, platinum
	Muhammed MacIntyre
	3
	-213.25
	38.94
	35

From our **blog** to our **support** team, we're  
here for you if and when you need us! **it's**  
**time to import your Leads!**