

Lead Import Guide

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Format

Up to 20,000 leads can be imported at a time. Leads can be imported in either XML or CSV format. XML data should be formatted as follows, with each set of lead data being enclosed in a repeating element:

```
<?xml version="1.0" encoding="ISO-8859-1"?>
<data>
  <lead>
    <reference>Lead123</reference>
    <source>Google</source>
    <medium>PPC</medium>
    <term>Loans</term>
    <title>Mr</title>
    <firstname>John</firstname>
    <lastname>Smith</lastname>
    <company>ABC Ltd.</company>
    <jobtitle>Manager</jobtitle>
    <phone1>0161 123 1234</phone1>
    <phone2>07912 123 456</phone2>
    <fax>0161 123 1235</fax>
    <email>john@abc.com</email>
    <address>1 High Street</address>
    <address2>This Village</address2>
    <towncity>This Town</towncity>
    <postcode>BB12 6EG</postcode>
    <dobday>01</dobday>
    <dobmonth>01</dobmonth>
    <dobyyear>1990</dobyyear>
    <contacttime>Anytime</contacttime>
    <data1>Ford</data1>
    <data2>Mondeo</data2>
    <data3>2005</data3>
    <data4>4000</data4>
  </lead>
  <lead>
    .. Next Lead Here
  </lead>
</data>
```

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:

FIRSTNAME	LASTNAME	PHONE1	..
John	Smith	0161 123 1234	..
David	Jones	0121 321 4321	..

Fields/Elements

If a CSV or XML 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.

Field	Type	Req ¹	Sample	Notes
Ipaddress	String		192.168.0.1	Overrides detected IP add.
Received	Datetime		2009-01-01 10:15:00	Overrides current date/time
Reference	String		Lead123	Introducer's lead reference
Type ²	String		Secured Loan	Sets the lead type
User ²	String		Jane Smith	Sets the assigned user
Status ²	String		New	Sets the status
Source	String		Google	Marketing source
Medium	String		PPC	Marketing medium
Term	String		Loans	Marketing term
Value	Decimal		100.00	Lead value
Title	String	User	Mr	See Title Values
Firstname	String	Yes	John	
Lastname	String	Yes	Smith	
Company	String	User	ABC Ltd.	
Jobtitle	String	User	Manager	
Phone1 ³	Number	User	0161 123 1234	
Phone2 ³	Number	User	07912 123 456	
Fax ³	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 ⁴	String	User	BB12 6EG	
Dob	String	User	01/01/1990	Overrides ind. DOB fields
Dobday	Number		01	
Dobmonth	Number		01	
Dobyear	Number		1990	
Contacttime	String	User	Anytime	See Contact Time Values
Contactphone	String		Yes	See Contact Permission Vals
Contactfax	String		Yes	See Contact Permission Vals
Contactemail	String		Yes	See Contact Permission Vals
Contactmail	String		Yes	See Contact Permission Vals
Data1 – Data50	Varies	User	Anything	Lead group data field value

Notes

1. Fields marked 'User' can be set as required within the lead group's settings, so may be required. Fields marked 'Yes' are always required.
2. These are optional. If lead type is not specified, the lead type will be determined by lead type filters. If status is not specified, the first status with a 'New' conversion point will be set. If user is not specified, the lead will be unassigned.
3. Phone number validation level can be set within the lead group's settings. Either only valid UK formatted phone numbers will be accepted, or any value. If the field is set to accept any input, all non-numeric and whitespace characters will be stripped out.
4. Postcode validation level can be set within the lead group's settings. Either only valid UK postcodes will be accepted, or any value.

Title Values

Value
Mr
Mrs
Ms
Miss
Dr
Rev

Contact Time Values

Value
Anytime
Morning
Afternoon
Evening

Contact Permission Values

This value indicates whether permission has been obtained to make contact by phone, fax, email or mail.

Value	Description
Unknown	Not known
Yes	Permission obtained
No	Do not contact using this medium