CSV Import Formats

This document describes the expected CSV formats for importing Companies, Contacts, and Leads into the CCS Lead Agent v2 system.

General Requirements

- **File Type:** CSV (Comma-Separated Values) with `.csv` extension
- **Encoding:** UTF-8
- **File Size:** Maximum 10MB per file
- **Headers:** First row must contain column headers (case-sensitive)
- **Delimiter:** Comma (,)
- **Text Qualifier:** Double quotes (“) for fields containing commas or line breaks

Companies CSV Format

Required Headers

```
name,website,industry,country,size
```

Field Descriptions

Field	Required	Type	Description	Example
name	✓	String	Company name	“Acme Corporation”
website	✗	URL	Company website	“https://acme.com”
industry	✗	String	Industry sector	“Technology”
country	✗	String	Primary country of operation	“South Africa”
size	✗	String	Employee count range	“50-200”

Size Field Values

Recommended values: `"1-10"`, `"11-50"`, `"51-200"`, `"201-500"`, `"501-1000"`, `"1000+"`, or custom ranges

Example CSV

```
name,website,industry,country,size
"Acme Corporation","https://acme.com","Technology","South Africa","50-200"
"Global Traders Ltd","https://globaltraders.co.za","Import/Export","Botswana","11-50"
"Innovation Hub","","Technology","South Africa","1-10"
```

Validation Rules

- **name:** Cannot be empty
- Duplicate detection: Company names are matched case-insensitively
- If a company with the same name exists, it will be **updated** with new data
- If a company doesn't exist, it will be **created**

Contacts CSV Format

Required Headers

```
firstName,lastName,email,phone,role,companyName
```

Field Descriptions

Field	Required	Type	Description	Example
firstName	✓	String	Contact's first name	"John"
lastName	✓	String	Contact's last name	"Doe"
email	✓	Email	Contact's email address	"john@acme.com"
phone	✗	String	Phone number with country code	"+27123456789"
role	✗	String	Job title or role	"CEO"
companyName	✗	String	Associated company name	"Acme Corporation"

Example CSV

```
firstName,lastName,email,phone,role,companyName
"John","Doe","john@acme.com","+27123456789","CEO","Acme Corporation"
"Jane","Smith","jane@globaltraders.com","+267987654321","Sales Director","Global Traders Ltd"
"Alice","Johnson","alice@innovation.co.za","","CTO","Innovation Hub"
```

Validation Rules

- **firstName, lastName, email:** Cannot be empty
- **email:** Must be a valid email format
- Duplicate detection: Contacts are matched by email (case-insensitive)
- If a contact with the same email exists, it will be **updated** with new data
- If a contact doesn't exist, it will be **created**

Company Matching Logic

- **companyName** is matched against existing companies (case-insensitive)
- If matching company found: Contact is linked to that company
- If company not found: A new company is **created** with just the name
- If companyName is empty: Contact is created without company linkage

Leads CSV Format

Required Headers

```
email,firstName,lastName,phone,country,status,score,source,companyName,contactEmail
```

Field Descriptions

Field	Required	Type	Description	Example
email	✓	Email	Lead’s email address	“jane@example.com”
firstName	✗	String	Lead’s first name	“Jane”
lastName	✗	String	Lead’s last name	“Smith”
phone	✗	String	Phone number with country code	“+27987654321”
country	✗	String	Lead’s country	“South Africa”
status	✗	String	Lead status	“new”
score	✗	Integer (0-100)	Lead score	“75”
source	✗	String	Lead source	“referral”
companyName	✗	String	Associated company name	“Acme Corporation”
contactEmail	✗	Email	Associated contact email	“john@acme.com”

Status Field Values

Allowed values: `"new"`, `"contacted"`, `"qualified"`, `"proposal"`, `"negotiation"`, `"closed-won"`, `"closed-lost"`

Default if not provided: `"new"`

Example CSV

```
email,firstName,lastName,phone,country,status,score,source,companyName,contactEmail
"jane@example.com","Jane","Smith","+27987654321","South Africa","new","75","referral","Acme Corporation","john@acme.com"
"peter@testcompany.com","Peter","Jones","+267123123123","Botswana","qualified","85","website","Global Traders Ltd","jane@globaltraders.com"
"lisa@demo.com","Lisa","Brown","","South Africa","new","50","linkedin","","",
```

Validation Rules

- **email:** Cannot be empty and must be valid email format
- **score:** Must be integer between 0-100 (defaults to 0 if invalid)
- Duplicate detection: Leads are matched by email (case-insensitive)
- If a lead with the same email exists, it will be **updated** with new data

- If a lead doesn't exist, it will be **created**

Company Matching Logic

- **companyName** is matched against existing companies (case-insensitive)
- If matching company found: Lead is linked to that company
- If company not found: A new company is **created** with just the name
- If companyName is empty: Lead is created without company linkage

Contact Matching Logic

- **contactEmail** is matched against existing contacts (case-insensitive)
- If matching contact found: Lead is linked to that contact
- If contact not found: Lead is created without contact linkage (will NOT auto-create contact)
- If contactEmail is empty: Lead is created without contact linkage

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Import Process

How Import Works

1. **File Upload:** User uploads CSV file and selects import type
2. **Validation:** File is validated for:
   - Correct file type (.csv)
   - File size (max 10MB)
   - Valid headers matching expected format
3. **Job Creation:** ImportJob record is created with status "pending"
4. **Processing:** Each row is processed:
   - Row validation
   - Matching logic applied (check for duplicates)
   - Create or update records
   - Track success/error counts
5. **Completion:** ImportJob is updated with final statistics

Error Handling

- **Row-level errors:** If a single row fails validation, it is skipped and counted as an error
- **The import continues** processing remaining rows
- **Partial imports:** Successful rows are saved even if some rows fail
- **Error reporting:** Error details are logged in the ImportJob's errorMessage field

Common Error Scenarios

Error	Description	Resolution
Missing required field	Required field is empty	Fill in the required field or remove the row
Invalid email format	Email doesn’t match pattern	Correct the email format
Invalid score	Score is not 0-100	Provide valid score or leave empty for default
File too large	File exceeds 10MB	Split into multiple smaller files
Wrong headers	Headers don’t match expected format	Use exact header names from documentation

Best Practices

1. **Test with small files first:** Start with 5-10 rows to validate format
2. **Clean data:** Remove duplicates and validate data before import
3. **Use UTF-8 encoding:** Ensure special characters are preserved
4. **Quote text fields:** Use quotes around fields containing commas or special characters
5. **Backup data:** Export existing data before large imports
6. **Monitor import status:** Check the import history table after uploading
7. **Review errors:** If rowsError > 0, review error messages and re-import corrected rows

Sample Files

Sample CSV files are available in the `test-data/` directory:
- `sample-companies.csv`
- `sample-contacts.csv`
- `sample-leads.csv`

Use these as templates for your own imports.

Support

For issues or questions about CSV imports:
- Check the import history table for error messages
- Verify your CSV format matches the examples above
- Ensure all required fields are present and valid
- Contact technical support if errors persist