

Leads Bulk Upload Instructions

File Format Requirements

1. Accepted Format: CSV (.csv)
2. File Encoding: UTF-8
3. First Row: Must contain column headers (e.g., First Name, Email, etc.)

Required Columns

The following fields are mandatory for each lead:

- workspace_id
- assigned_to
- first_name
- last_name
- email
- country_code
- country_iso_code
- phone
- source_id
- stage_id
- created_by
- company

Optional Fields

- job_title
- industry
- website
- linkedin
- instagram

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- facebook
- pinterest
- city
- state
- zip
- country

Upload Process

1. Select and Upload File: Click on 'Upload' and choose your CSV file.
2. Map Fields: Match each system field with your CSV columns.
3. Preview Data: Review the data and correct any errors.
4. Submit: Click 'Upload & Continue' when ready.

Important Notes

- All required fields must be mapped.
- Invalid or duplicate emails will be skipped.
- Ensure values like source_id and stage_id exist in your system.

Sample CSV Format

```
first_name,last_name,email,phone,country_code,country_iso_code,workspace_id,assigned_to,
source_id,stage_id,created_by,company
John,Doe,john@example.com,1234567890,+1,US,1,5,2,3,1,Acme Inc
```