

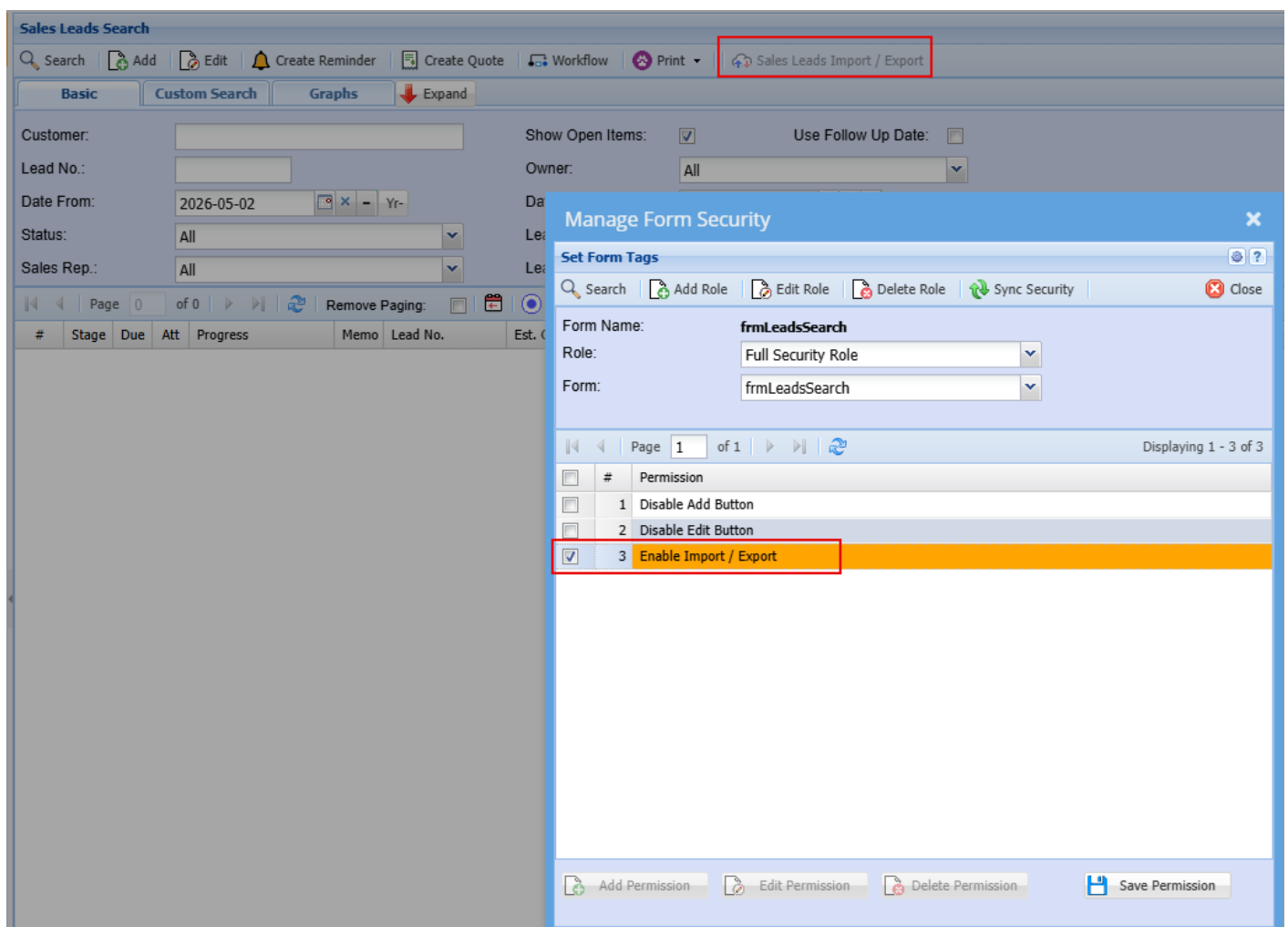
Sales Leads import export

This feature allows for exporting and importing of sales leads.

It can be used to import new leads or update existing leads.

Sales leads import export function is disabled by default.

Enable via Form security



Export the data based on the search

This will give you the template layout as well as the data

Sales Leads Import / Export
Close

Import / Export
Close

Export Data:
Export

Import Using ID:
☐

Select & Upload File:
Select File...

Verify Data File:
Verify
Report

Import Data File:
Import
Report

Drag & Drop

Drop files here to upload

Close

Exported Data

To add a new Sales, leave the Lead number blank and enter the DebtorCode

	A	B	C	D	E	F	G	H	I	J	K
1	LeadNo	DebtorCode	DebtorName	Owner	SalesRep	Rating	Status	Reference	Description	Stage	CustomerType
2	LD18	WAL	Walice Co	Malcolm Granville	DEALER	Warm	Pending	Information	Pumps	Stage 2	New
3	LD17	ADV001	New custome1	Malcolm Granville	DEALER	Cold	Pending		New stock	Stage 2	New
4	LD16	PRO001	Promains	Malcolm Granville	DEALER	Cold	Pending		ERP system	Stage 0	New
5	LD15	FAR001	Farmlands	Malcolm Granville	DEALER	Warm	Pending		Wanting information on ERP	Stage 2	New
6	LD13	ABC0010	ABC Company	Malcolm Granville	DEALER		Pending	Scanner order	Scanner ScanSKU	Stage 3	
7	LD12	ABC0010	ABC Company	Malcolm Granville	DEALER	Cold	Pending		new lead	Stage 0	
8	LD1	NEW-14	Safe R Brakes	Malcolm Granville	DEALER	2	Pending	Onsite Visit, just upgraded computer system and		Stage 5	New
9		HUB-10000		Pamela Dean							
10											
11											

These fields will auto populate if you don't fill them in

Field	Default setting	Can set to
Contact Person	default contact person of setup	N/A
Lead Status	In Progress	N/A
Sale Rep	default to the prospect or customer setup. If none, leave blank	Sales Rep code
Rating	Cold	Cold, Warm or Hot
Probability	0%	10, 20, 30 etc
Stage	First one on the list - Stage0	Stage codes
Est Close Date	7 days from Imported date	N/A

Follow up date	same as Est close date	N/A
Customer Type	New	New or Existing
Division	Default to customer setup	Division Code
Region	Default to customer setup	Region Code

Revision #1
Created 30 June 2026 20:42:19 by Malcolm
Updated 30 June 2026 20:56:08 by Malcolm