

Lead Imports

If you need to have the Salesforce Team import Leads for you from a list (i.e. a spreadsheet/csv), please see below for instructions, policies, etc.

[We have provided a template for you as a related attachment on this document. See "Attachments" section.](#)

What Is Required for a Lead Import?

Salesforce requires a few fields in order to create a Lead.

The *bare minimum* required fields include:

- **First Name**
- **Last Name**
 - A valid Last Name **is not** a "?" or a repeat of the first name (i.e. "John John"). Please - do not create poor data in our Salesforce instance by providing a fake Last Name value
- **Company**
 - The name of the business the Lead is associated with; should be the company's official name
- **Phone**
 - A valid phone number with an area code
- **Lead Source**
 - MUST be a valid Lead Source value, as this is a picklist field; MUST be spelled **exactly** as we have our values. You may find our Lead Source values [here](#) under the Account/Lead Source Picklist Values section. Inactive values are *not* valid.
 - If you are unsure what the Lead Source should be for your list, please speak with Marketing and/or Sales Enablement for assistance
- **Owner**
 - First and Last Name of the Salesforce User that should own each Lead
- **Record Type**
 - You can find Record Type values [here](#)

While these are the only fields required, **we strongly encourage to provide as much data as possible or as relevant to the type of Leads you are importing.**

What File Format Does My List Need To Be?

Accepted file formats include Microsoft Excel (.xlsx), Google Sheets, or .csv

What Can I Do To Get My List Uploaded FAST?

All requests to import Leads will be put in our ticket queue. Every effort by the Salesforce Team will be made to get your list into Salesforce as quickly as possible. **Lists with complete, accurate data will be prioritized as they are much faster for our team to import.** This means no 'fixes' or changes from the Salesforce Team are necessary.

Lists that lack the necessary data (i.e. required fields as mentioned above) or are poorly constructed (i.e. column names do not match Salesforce field names) cannot be prioritized as quickly as lists that have complete data, due to the extra time it takes our team to clean up your list. Poorly constructed list imports always lead to errors with importing.

Here is an example of a **poorly constructed list**.

	A	B	C	D	E	
1	Name	Company	Telephone	Lead Source	Owner	
2	John Doe	ABC Company	801-444-9990	?	Me	
3	Jane Doe	ABC Company	801-444-9990	Self Generated	Me	
4	Michael Scott	Dunder Mifflin	5463334040	Self Generated	John	
5	Jim Halpert	Dunder Mifflin	(900)840-9494	Zoom Info	Me	
6						

Can you spot what is wrong with this list?

- Column Names do not match Salesforce Field names *exactly*
 - "Name" is not a valid field for the Lead. It should be broken out into 2 column for "First Name" and "Last Name"
 - "Telephone" is not the name of the field in Salesforce - it should be "Phone"
- Picklist Values not valid
 - "?" and "Zoom Info" are not valid picklist values for the Lead Source field. "?" does not exist (and the user should figure out the Lead Source for each Lead they want imported) and "Zoom Info" is not how we spell the picklist value - it should be "Zoominfo"
 - REMINDER: you can find our [Lead Source values here](#)
- Inaccurate values; expecting others to find the data for you
 - "Me" is not an accurate Owner. By putting "me", you expect the Salesforce Team to edit your list to have your own First and Last Name. You also expect the Salesforce Admin to know who "me" is
 - "John" is only a partial name of a user

Here is an example of a **well constructed list**.

	A	B	C	D	E	F	G	H	I	
1	First Name	Last Name	Email	Company	Website	Phone	Lead Source	Owner	Record Type	
2	John	Doe	johndoe@abc.com	ABC Company		801-444-9990	ABM	Mike Wazowski	Default	
3	Jane	Doe	janedoe@abc.com	ABC Company		801-444-9990	Self Generated	Mike Wazowski	Partner	
4	Michael	Scott	mscott@dundermiff.com	Dunder Mifflin	dundermiff.com	5463334040	Self Generated	John Smith	Partner	
5	Jim	Halpert	jhalpert@dundermiff.com	Dunder Mifflin	dundermiff.com	(900)840-9494	Zoominfo	Mike Wazowski	Reseller Customer	
6										
7										

Here is what is great about this list:

- Column Names match Salesforce Field names
- Picklist Values are valid (Lead Source)
- Cells are left blank for non-required fields where the user doesn't have a value
 - Website
- Real, complete values
 - Owner has both the First and Last Name of the Salesforce User as you would find them if you searched their user record
 - Values provided for Record Type are real
- Proper formatting
 - The different formatting in "Phone" is ok - Salesforce accepts multiple formats; though consistent formatting is encouraged to avoid errors where you may not be expecting a rigid format for a particular field
- Record Type specification
 - At Revver, we use Record Types for Leads. You can find [valid Record Types here](#)

Revision #7

Created 13 December 2023 21:52:16 by Anna Maruji

Updated 14 December 2023 17:31:22 by Anna Maruji