

How to Import Multiple Leads into AgentRoof CRM

Follow these steps to import multiple leads into AgentRoof CRM using a CSV file.

Steps

1. Log in to AgentRoof CRM.
2. From the left-hand menu, click **CRM**.
3. Click the three-dot **More** option in the Leads toolbar and select **Import**.
4. Under **Select From**, choose the appropriate import option:
 - Direct Import
 - Facebook Import
5. Click the blue **Given Format** link to download the sample CSV file for the selected import type.
6. Open the downloaded CSV file.
7. Enter the lead information in the corresponding columns.

Direct Import Fields

For Direct Import, complete the following fields:

- Name
- Phone Number
- Email ID
- Tags
- Source
- Stage
- Notes

Field Requirements

- Each lead must have a valid name.
- Provide at least one contact method: a phone number, an email address, or both.
- Phone numbers must be valid 10-digit numbers without country codes or brackets.
- To add multiple phone numbers, separate them using a comma and a space. The first phone number will be used as the primary phone number.
- Email addresses must be entered in a valid format.
- To add multiple email addresses, separate them using a comma and a space. The first email address will be used as the primary email address.
- To assign multiple tags, enter them as comma-separated values.
- If no tag is provided, no tag will be assigned during import.

- If the Stage field is left blank, the lead will be assigned the default stage **Lead**.
- If the Source field is left blank, the lead will be assigned the default source **Import**.

Facebook Import Fields

For Facebook Import, the CSV file must contain the following columns:

- id
- created_time
- ad_id
- ad_name
- adset_id
- adset_name
- campaign_id
- campaign_name
- form_id
- form_name
- is_organic
- platform
- full_name
- phone_number
- email

8. Save the completed CSV file.
9. Return to AgentRoof CRM and upload the file.
10. Submit the import request.

Result

The import process will run in the background. A confirmation message will be displayed when the file is successfully added to the queue.

Once the import process is complete, an email notification will be sent to your registered email address indicating the import status.

- Successful imports will display the number of leads imported.
- Failed imports will include the corresponding error details.

You can view the imported leads from the Leads section in AgentRoof CRM.

You have successfully imported multiple leads into AgentRoof CRM.

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