



## PD Lead Portal: Lead Delivery & CRM Upload

### How Are the Leads Delivered?

Our PD Portal Lead Packs are designed for seamless integration into your CRM systems. Here's how we ensure a smooth process:

#### 1. **Delivery Format:**

- Leads are delivered via email as a CSV file. This format is widely compatible with most CRM systems, making it easy to import and manage your leads.

#### 2. **Uploading to CRM:**

- Once you receive the CSV file, it can be uploaded directly into your CRM. If you're unfamiliar with this process, we've compiled some general tips and guidelines to assist you.

#### 3. **General Tips on Uploading/Mapping a CSV File to a CRM:**

- **Preparation:** Before uploading, ensure your CRM fields are set up to match the data in the CSV file. This includes fields like Name, Title, Company, Email, Phone Number.
- **Mapping:** During the upload process, your CRM will ask you to map the CSV fields to the corresponding CRM fields. Double-check to ensure all data points are correctly matched.
- **Verification:** After the upload, verify that the leads are accurately imported into your CRM. Check for any discrepancies and resolve them promptly.

### Support

If you encounter any issues or need further assistance, our support team is here to help. Contact us at [support@pdleadportal.com](mailto:support@pdleadportal.com)

**PD Lead Portal Team**