

AUTOMOTIVE CRM IMPORT TEMPLATE

Fill one row per customer and upload the file in LeadLocate under Contacts. Keep the header row. Any extra column you add is kept as a labeled note on the contact, so nothing in your book of business is lost. The sample rows use made up names, 555 phone numbers and example.com emails: replace them with your own customers.

CONTACTS

First Name	Last Name	Mobile Phone	Email	Street Address	City	State	ZIP	Vehicle of Interest	Trade Year	Trade Make	Trade Model	Trade Mileage	Lead Source	Salesperson
Maria	Lopez	916-555-0142	maria.lopez@example.com	100 Main St	Sacramento	CA	95811	Used midsize SUV	2017	Honda	Accord	88000	Walk in	Sam R
James	Carter	916-555-0177	j.carter@example.com		Elk Grove	CA	95624	New half ton truck, stock STK10442					Referral	Sam R
Ana	Nguyen	916-555-0109			Roseville	CA	95678		2015	Toyota	Camry	121000	Service lane	Dee P

FIELD GUIDE

Column	What to put in it	Required
First Name, Last Name	The customer's name. One column with the full name also works.	Yes
Mobile Phone	Ten digits. Any format works: 916-555-0142, (916) 555-0142 or 9165550142.	Phone or email
Email	One address per customer.	Phone or email
Street Address, City, State, ZIP	Optional. Fills the customer profile and helps match duplicates.	No
Vehicle of Interest	What they want, or the exact unit they asked about with its stock number.	No
Trade Year, Make, Model, Mileage	The vehicle they own today. A second trade can go in another set of columns.	No
Lead Source	Where the customer came from (walk in, referral, service lane, event).	No
Salesperson	The user who owns the contact. Leave blank to assign to the person importing.	No
Tags	Comma separated words you filter by later (past customer, equity, VIP).	No
Do Not Call	Yes adds the number to your Do Not Call list so no text or call goes out.	No
Notes	Anything else. Extra columns you add are kept as labeled notes too.	No

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