

AccuprimeFlow for marketing

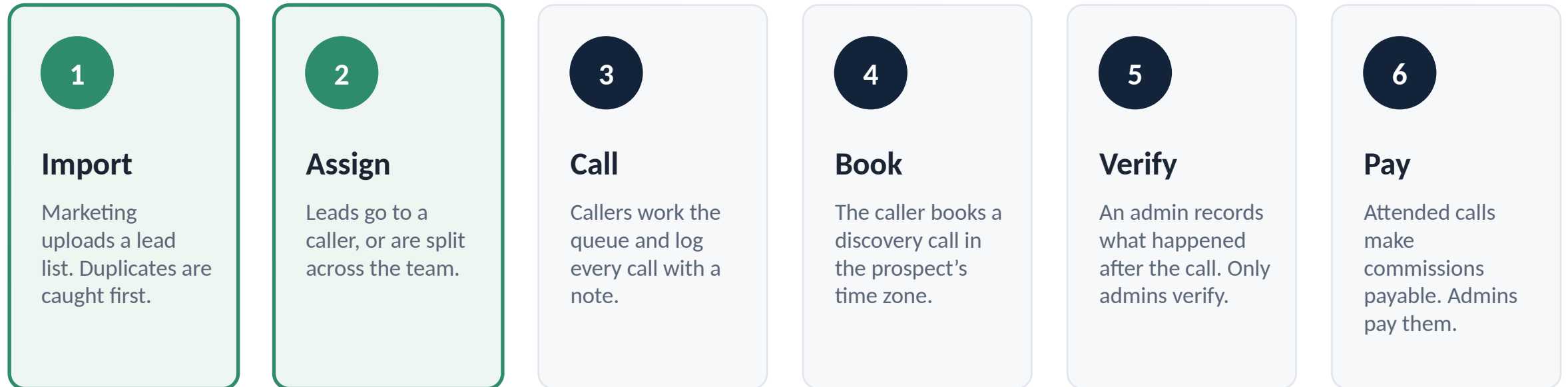
How to import lead lists, assign them to callers and see which lists work.



How a lead moves through AccuprimeFlow



Your part is the start of the journey, and knowing which lists turn into clients.



Only admins verify discovery calls. Callers and marketing never mark a call attended; commissions become payable only after an admin does.

Import a lead list

Import leads

ET 6:24 PMCT 5:24 PMPT 3:24 PM

Upload a lead list as Excel or CSV. Nothing is saved until you've checked the preview and confirmed. Duplicates are flagged against every prospect already in AccuprimeFlow and within the file.

File

Excel or CSV file

Choose File

lead-database-sample.xlsx

Sheet

Healthcare B1 (18 rows) ▼

3 sheets in this file. Each sheet imports as its own batch.

Batch

Batch name

Healthcare B1 – 2026-09-25

Source

lead-database-sample.xlsx

Default category

Healthcare ▼

Rows take their category from the Industry column when it maps to one below; everything else uses the default.

Columns

Header found on row 3. Check each column goes to the right field; this layout is remembered for the next file with the same headers.

Column in file	Example	Goes to
COMPANY NAME	Harbor Cardio	Company ▼
INDUSTRY	Health Care	Industry (sets the category) ▼
CATEGORY	Cardiology diagnostics	Niche / description ▼
LEAD NAME	Erin Vale	Contact name ▼
POSITION	CEO/Founder	Title / position ▼
TIMEZONE		Time zone ▼

1

Choose an Excel or CSV file, then check the columns.

- AccuprimeFlow finds the header row and matches most columns for you.
- Pick the sheet, name the batch, set the source (for example Apollo).
- Choose the default category; industry spellings are remembered for next time.

Check the preview

Import leads

ET 6:24 PMCT 5:24 PMPT 3:24 PM

Nutraceutical Life Sciences & Dietary Supplements1Default: HealthcareNew

(blank)1Default: Healthcare

Check rows

Preview: Healthcare B1

All rows 18Ready to import 15Flagged 5Duplicates 1Skipped 2

Healthcare: 15Time zone from area code: 14, unknown: 1

Row	Company	Contact	Phone	Category	Time zone	Result
5	Harbor Cardio	Erin Vale CEO/Founder	(713) 703-8525 +1 more	Healthcare	CT (area code)	Ready
6	Bayside Therapy	Nora Quill Founder	(210) 316-1792 +1 more	Healthcare	CT (area code)	Ready
7	Quiet Clinic	Omar Pike Owner	—	Healthcare	—	SkippedNo phone number
8	Paralel Health	Ivan Morrow Founder and CTO	(310) 748-1971	Healthcare	PT (area code)	FlaggedShares a line with Dana Sol at Paralel Health (row 9). Imports with a note.
9	Paralel Health	Dana Sol Chief Executive Officer	(310) 748-1971	Healthcare	PT (area code)	FlaggedShares a line with Ivan Morrow at Paralel Health (row 8). Imports with a note.
10	Profit Lens	John Brandt Owner	(714) 271-1200	Healthcare	PT (area code)	Ready
11	Profit Lens	John Brandt Founder	(714) 271-1200	Healthcare	PT (area code)	DuplicateRepeated in this file: row 10: John Brandt at Profit Lens. ☐ Import anyway
12	Albion Wellness	Pip Harrow Director	0330 223 7143	Healthcare	—	FlaggedInternational number. Imports with a note.
		Gail Ooen				

Download skipped and duplicate rows

Import 15 prospects

2

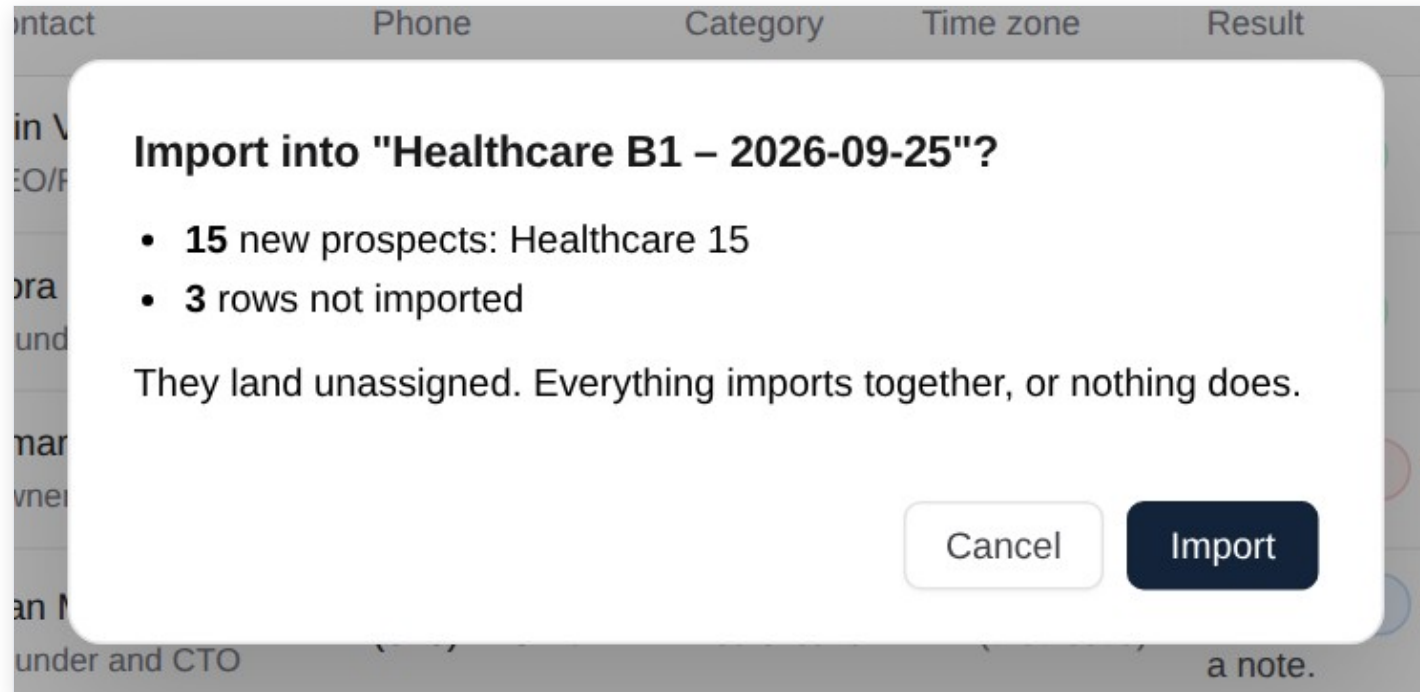
Click "Check file" and read the counts before importing.

- Ready: will be imported.
- Flagged: will be imported, with a note (shared phone line, international number).
- Duplicates and skipped rows are not imported. Download the list to see why.

Import

3

Confirm, and the list goes in as one batch.



- The confirmation shows the totals by category.
- Large files import in parts automatically, with progress shown.
- The batch appears under Recent imports.

How duplicates are handled

AccuprimeFlow checks every row against the file itself and everything already in the system.

Same person, same phone

A duplicate. Skipped, unless you tick "Import anyway" after checking it.

Two people, one phone

A shared line, such as a clinic's front desk. Both come in, flagged.

Closed before

Skipped, or reopened on purpose if you tick "Reopen", keeping its history.

Do not call

Always skipped. There's no way to import it again.

No phone or no company

Skipped, with the reason shown in the preview.

Test upload by mistake

The super admin can delete a whole import from Recent imports.

Assign leads

Assign leads

ET 6:24 PMCT 5:24 PMPT 3:24 PM

Open prospects nobody is working yet, oldest first. Assign a few by hand, or select a whole filter and split it evenly between callers.

Team load

Ana Cruz

6 open

4 not yet called · 0 callbacks

Ruth Lagahit

13 open

4 not yet called · 3 callbacks

Search

Company, contact, email or phone

Category

All

Batch

All

Fit

Any

Time zone

Any

Sort

Waiting longest

☐ Company / contact	Category	Fit	Time zone	Batch	Waiting
☐ Pool Clinic 1 Contact 1	Healthcare	Potential fit	ET	Healthcare B1	Today
☐ Pool Clinic 10 Contact 10	Healthcare	Potential fit	ET	Healthcare B1	Today
☐ Pool Clinic 11 Contact 11	Healthcare	Potential fit	ET	Healthcare B1	Today
☐ Pool Clinic 12 Contact 12	Healthcare	Potential fit	ET	Healthcare B1	Today
☐ Pool Clinic 13 Contact 13	Healthcare	Potential fit	ET	Healthcare B1	Today
☐ Pool Clinic 14 Contact 14	Healthcare	Potential fit	ET	Healthcare B1	Today
☐ Pool Clinic 15 Contact 15	Healthcare	Potential fit	ET	Healthcare B1	Today
☐ Pool Clinic 16 Contact 16	Healthcare	Potential fit	ET	Healthcare B1	Today
☐ Pool Clinic 17 Contact 17	Healthcare	Potential fit	ET	Healthcare B1	Today

4

New leads wait in the pool until you hand them out.

- Team load shows each caller’s open leads, callbacks and discovery calls.
- Filter by batch, category, fit or time zone.
- Leads waiting a day or more are highlighted.

Assign or split

Category

Batch

Split 50 prospects evenly

Dealt in turn, in the order shown. Prospects a caller already has stay put if the deal gives them back to the same person.

☒

Ana Cruz

+25 6 open now

☒

Ruth Lagahit

+25 13 open now

Cancel

Split and assign

5

Select leads, then give them to one caller or split them evenly.

- Tick a page, or "Select all matching" for thousands at once.
- "Split evenly" deals them across the callers you choose.
- Reassigning keeps each lead's full call history.

List performance

6

Which lists, sources and categories turn into clients.

- By batch, category or source.
- Called, reached, booked, attended and won for each list.
- Green and amber mark lists doing better or worse than average.

List performance

ET 6:24 PMCT 5:24 PMPT 3:24 PM

How each lead list turns into conversations, discovery calls and clients. Lifetime results for every prospect in the list; the date filter picks lists by when they were imported.

BatchCategorySource

ImportedAll time

Green and amber mark lists reaching people or booking calls at least 10% better or worse than all lists together.

Batch	Prospects	Called	Reached	Booked	Booked per 100	Attended	Won	Deal value	Unreachable	Do not call	Still open
Healthcare B1 Imported Sep 13, 2026, 6:24 PM	55	11% 6	233% of called	6	10.9	2	1	\$20,000.00	0%	0	54
Healthcare B1 – 2026-09-25 Imported Sep 25, 2026, 6:24 PM	15	0% 0	— of called	0	0	0	0	—	0%	0	15
Coaching Sept Imported Sep 19, 2026, 6:24 PM	5	0% 0	— of called	0	0	0	0	—	0%	0	5
All lists	75	8%	317%	6	8	2	1	\$20,000.00	0%	0	74

Appointments

7

Every discovery call the team has booked.

Appointments

ET 6:24 PMCT 5:24 PMPT 3:24 PM

Every discovery call. Times are EDT, with the prospect's own time beside it.

Caller

UpcomingPastAll

All callers

Today

9:24 PM EDT

Harbor Cardio Group

Dana Reyes

[\(312\) 555-1000](#)

Ruth Lagahit

Owner and office manager

[Meeting link](#)

Scheduled

Tomorrow

8:24 PM EDT
7:24 PM CT theirs

Bright Physio

Mark Ellison

[\(312\) 555-1001](#)

Ruth Lagahit

Owner and office manager

[Meeting link](#)

Scheduled

1–2 of 2

PreviousNext

- Upcoming or past, grouped by day, with the caller and the result.
- Filter by caller.
- Recording what happened is done by an admin in Verification.

My commissions

My commissions

ET 6:24 PMCT 5:24 PMPT 3:24 PM

Your commissions: what's waiting on a discovery call, what you've earned but haven't been paid yet, and what's been paid.

\$160.00

Waiting on discovery calls

4 bookings not yet verified

\$1,080.00

Earned, not paid yet

3 commissions

\$0.00

Paid this year

0 commissions

Commission report

Discovery call	For	Amount	Status	Date
Cedar Point Therapy Fri, Sep 25, 1:24 PM	Team rate per attended discovery call: \$40.00	\$40.00	Waiting	Sep 25, 2026, 6:24 PM
Lakeside Dental Thu, Sep 24, 10:24 PM	Team rate per attended discovery call: \$40.00	\$40.00	Waiting	Sep 25, 2026, 6:24 PM
Bright Physio Sat, Sep 26, 8:24 PM	Team rate per attended discovery call: \$40.00	\$40.00	Waiting	Sep 25, 2026, 6:24 PM
Harbor Cardio Group Fri, Sep 25, 9:24 PM	Team rate per attended discovery call: \$40.00	\$40.00	Waiting	Sep 25, 2026, 6:24 PM
Evergreen Care Mon, Sep 21, 6:24 PM	5% of \$20,000.00 deal value	\$1,000.00	Earned	Sep 23, 2026, 6:24 PM
Evergreen Care Mon, Sep 21, 6:24 PM	Team rate per attended discovery call: \$40.00	\$40.00	Earned	Sep 23, 2026, 6:24 PM
Blue Harbor Medical Wed, Sep 23, 6:24 PM	Team rate per attended discovery call: \$40.00	\$40.00	Earned	Sep 23, 2026, 6:24 PM

8

If you earn a team commission, it shows here.

- Waiting: a discovery call is booked but not yet verified.
- Earned: an admin verified that the prospect attended, or the deal was won.
- No-show: nothing is earned for that call.
- Your commission is set by an admin when your account is created.

Questions?

Your admin for accounts, commission settings and anything that looks wrong.

Help page www.accuprimeflow.com/help.html

Build number in your account menu. Include it when you report a problem.