Leads Manual

A step-by-step guide to importing, reviewing, organizing, approving, comparing, and exporting lead records.

What Leads is for

Leads is your private working list for businesses and prospects. You can add a lead manually, save a useful search result, or import a CSV file.

A lead is not contacted automatically. Saving, importing, or approving a lead only changes its status inside Dolen.

Important: Review lead information before marking it ready for outreach.

Add or import leads

Use **Import Leads** to choose a CSV file. When email outreach is planned, include at least name and email columns. Other helpful columns are company, phone, website, city, notes, and source.

Use **Add Lead** when entering one prospect manually.

Saved Search results can also be reviewed from Leads.

Important: Imported records should begin in **Needs Review**, not outreach-ready.

Review and organize

Use the status tabs and filters to find records that need attention.

Check names, email addresses, websites, source, notes, duplicates, and missing details. Correct obvious errors before moving forward.

Use notes and statuses to record why a lead matters and what should happen next.

Approve for outreach

Only choose **Approved for Outreach** after you have personally reviewed the prospect and have a legitimate reason to contact them.

Approval makes a lead available to the Email workflow. It does not send a message.

If information is incomplete or uncertain, leave the lead in Needs Review or use a note such as Needs verification.

Important: Approval is a controlled internal status, not consent, and it never sends email by itself.

Compare and export

Use comparison when you want to decide between options. Review fit, contact details, website, reviews when present, location, source, and missing information.

Use CSV or Excel export to create a working copy. Exporting does not send outreach or share the list automatically.

Keep only the information you need and handle personal information carefully.