



ORANGECRM

LEAD BATCH FILE FORMAT

VERSION 6.2



Lead File Format

Comma or TAB delimited text file as below. File may be quote-comma-quote delimited for all fields. Blank or empty fields should be included for proper field count, excluding custom fields.

01) Revision	6.0 (our internal revision Number)
02) Calling Center ID	The ID of the acquisition center (supplied by us)
03) Billing Plan	The plan or product purchased – will override the default
04) First Name	Name of customer
05) Middle Name	Name of customer
06) Last Name	Name of customer
07) Ship Address1	Fulfillment Address
08) Ship Address2	Fulfillment Address
09) Ship Address3	Fulfillment Address
10) Ship City	Fulfillment Address
11) Ship State	Fulfillment Address
12) Ship Zip Code	Fulfillment Address
13) Ship Country	Fulfillment Address
14) Phone	Contact phone number
15) Email	Contact email address
16) Order Date	Date order was taken (YYYYMMDD)
17) CC Acct Name	Name on the credit card
18) CC Acct Number	Credit card number
19) CC Expire Date	Date credit card expires (MMYY)

20) ACH Acct Name	USD name as appears on the customer's bank statement
21) ACH Acct Number	USD bank account number
22) ACH Acct Bank	USD name of the customers bank
23) ACH Routing	USD bank routing number or ABA number
24) ACH Acct Type	USD bank account type (CHECKING or SAVINGS)
25) ACH Bank City	USD bank city
26) ACH Bank State	USD bank state
27) CAN Acct Name	CAN name as appears on the customer's bank statement
28) CAN Acct Number	CAN bank account number
29) CAN Bank name	CAN bank name
30) CAN FIN	CAN Financial Institution Number
31) CAN FIBN	CAN Financial Institution Branch Number
32) Billing Address1	Billing Address
33) Billing Address2	Billing Address
34) Billing Address3	Billing Address
35) Billing City	Billing Address
36) Billing State	Billing Address
37) Billing Zip Code	Billing Address
38) Billing Country	Billing Address
39) Recording Number	Recording number or file name of the call
40) Product Sold	Simple description of the product sold or primary upsell
41) Unique ID	The ID assigned to this lead by the calling center

42) Agent	ID or name of agent that handled the call
43) Discount %	Percentage of discount given this customer (00)
44) CC Trans Type	When real-time billing has occurred (PREAUTH)
45) CC Trans Amount	Amount of real-time transaction (0.00)
46) CC Trans TXN	Gateway reference number, used for future a refund or capture
47) CC Trans Date	Date credit card preauthorization was processed (YYYYMMDD)
48) CC Bank GUID	GUID assigned to Bank of preauthorization – will override the default
49) CC Fee GUID	GUID assigned to Fee Schedule for PREAUTH – will override the default
50 - XX) Custom Field	Unlimited number of custom fields for specific data. These fields are not required and use the "attribute=value" format.
Customer Field	RevShare=xxx
Customer Field	RevShareDate=YYYYMMDD
Customer Field	WebUserName=xxx
Customer Field	WebPassWord=xxx
Customer Field	AffiliateCode=xxx
Customer Field	AffiliateSub=xxx
Customer Field	SalesPage=xxx
Customer Field	BirthCity=xxx
Customer Field	Category=xxx
Custom Field Example	TPVACCT=xxx
Custom Field Example	TPVPASS=xxx
Custom Field Example	DATEOFBIRTH=YYYYMMDD
Custom Field Example	[ACQ CENTER CUSTOMER FIELD TAG]=xxxx

Lead File Drop Off

Lead Batch File drop off to OrangeCRM uses 2048 bit encrypted FTP transfers that exceed required PCI Compliance standards. You will need FTP client software that supports FTP/SSL, such as FileZilla, CoreFTP, CuteFTP, etc.

Note that the Lead Batch File should not be PGP encrypted as the FTP transport is already encrypted. Also be aware that the file is not transfer using standard FTP (port 21) or sFTP (port 22).

FTP/SSL details:

Protocol: FTP/SSL (implicit)

Port: 990

Host: (supplied by us at setup)

User: (supplied by us at setup)

Pass: (supplied by us at setup)