

Upload Brokers

Overview

The **Upload Brokers** feature allows you to bulk import broker companies via Excel. It is accessed via **Setup → Broker Upload**.

UPLOAD BROKERS SCRIPTS

Upload Brokers For Assign: when uploading brokers, the CRM will replace the old indirect salesmen with the new assignee.
After upload, if the broker is assigned to users, It will Replace the current users with new users based on the attached sheet.

The screenshot shows a 'File Templates' section with two buttons: 'BROKER TEMPLATE' and 'DOWNLOAD BROKERS FOR ASSIGN'. Below these is a note: 'Fill the files, Remove the first row and save it as CSV "Comma Delemeted"'. Below that is a 'Browse' section with a 'Choose File' button, the text 'No file chosen', and 'Allowed File Types: CSV'. There are two radio buttons: 'Broker' (selected) and 'Upload Brokers For Assign'. A 'SUBMIT' button is at the bottom.

Two Upload Templates

When you open the upload page, two templates are available:

Template	Purpose
Broker Template	For adding new broker companies to the system.
Broker for Assign	For updating the assigned salesman for existing broker companies.

Broker Template — Required Fields

The Excel file must contain the following columns (highlighted in red are required):

Column	Required	Description
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Company Name	☐	Official broker company name.
Authorized Name	Optional	Authorized representative name.
Country Code	☐	Phone country code.
Mobile	☐	Contact number.
Email	☐	Email address.
CRN	Optional	Commercial Registration Number.
Address	Optional	Company address.
Descriptions	Optional	Notes about the company.
Type	☐	Broker type.
Salesman	Optional	Salesman name — must match exactly as it appears in the CRM.
Authorized ID Number	Optional	Authorized rep's ID number.
Owner	Optional	Owner name.
Tag	Optional	Tags.
Tax Card	Optional	Tax card number.

“ ⚠ The **Salesman** field must be written exactly as it appears in the CRM — same spelling, capitalization, and spacing. If more than one salesman is assigned, separate names with a comma: `Ahmed ,Mohamed ,Ali`.

Duplication Check

The system checks for duplicate broker companies based on:

- **Mobile**
- **Email**
- **CRN**
- **Tax Card**

If any of these match an existing broker, the row will be **rejected**.

File Format

- After filling in the data, **delete the first row** (the example/header row that comes with the template) before uploading.
 - Save your Excel file as **CSV UTF-8** before uploading.
 - The same applies for the **Broker for Assign** template — delete the first row and save as CSV UTF-8 before uploading.
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Broker for Assign Template

Used to update which salesman is assigned to existing broker companies. Download the template, update the Salesman column, and re-upload.

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