Add leads to a campaign in Instantly

Updated Sep 30, 2026

A lead is one person a campaign will email. The team adds people to the list drop sheet (guide 11); whoever loads campaigns brings the list into Instantly from the campaign's Leads tab. This guide walks up to the upload screen and stops there, so no real list is uploaded.

4 steps · 5 min · 1 watch-out

Watch it first: add leads to a campaign in one short video

The narrated video of this guide is in the library: https://campus.boldestimations.com/video/process-add-leads.mp4

4 steps, each with the screen you will see

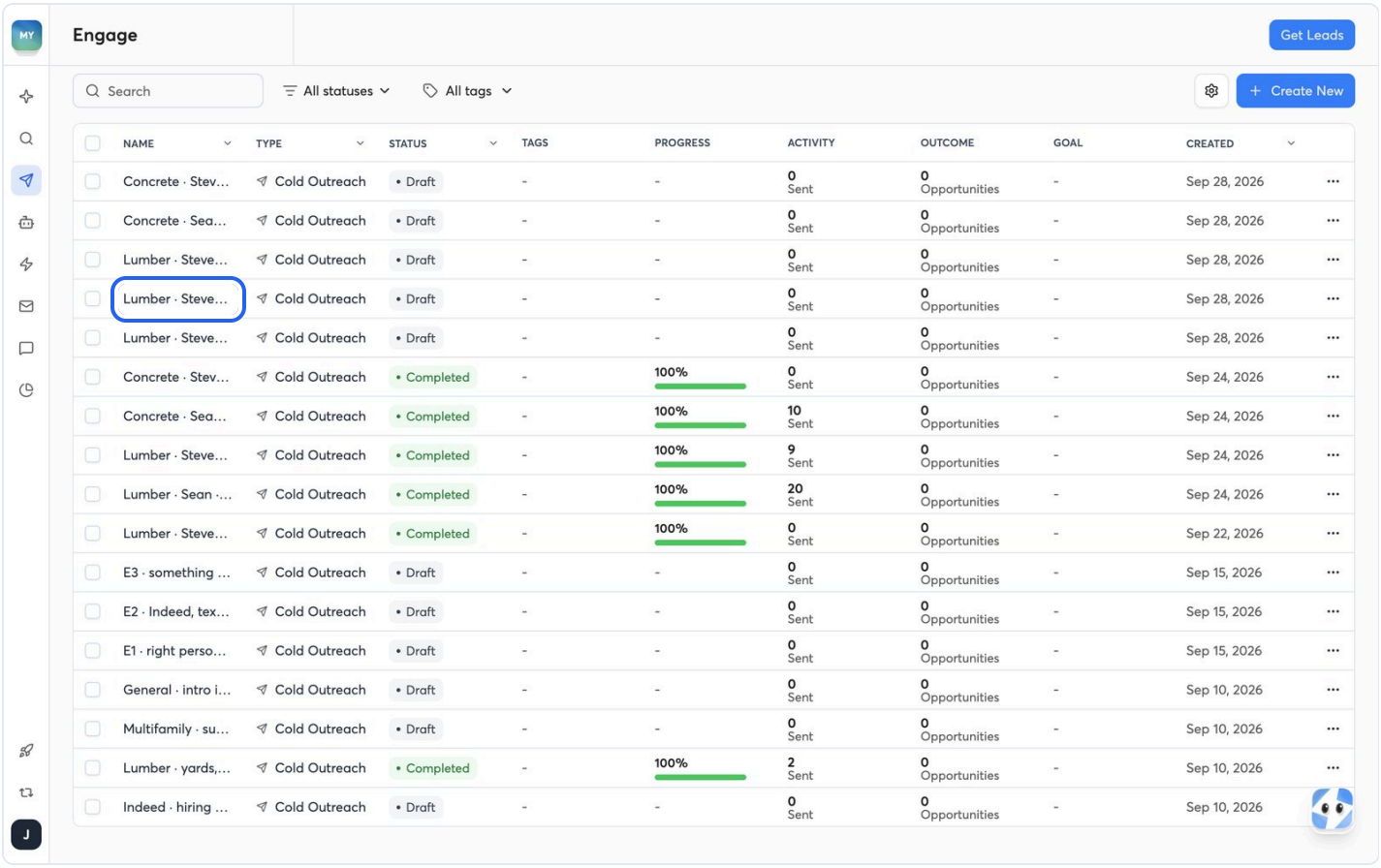
1. Open the campaign
2. Open Leads
3. Pick Upload CSV
4. The upload screen

Screens recorded Sep 30, 2026 in Bold Estimation's Zapmail, Instantly and Google accounts. Names, email addresses and phone numbers of real people are replaced with placeholders or blurred, and typed examples are made up. If a screen looks a little different, the tool has updated: find the same label nearby.

1 Open the campaign

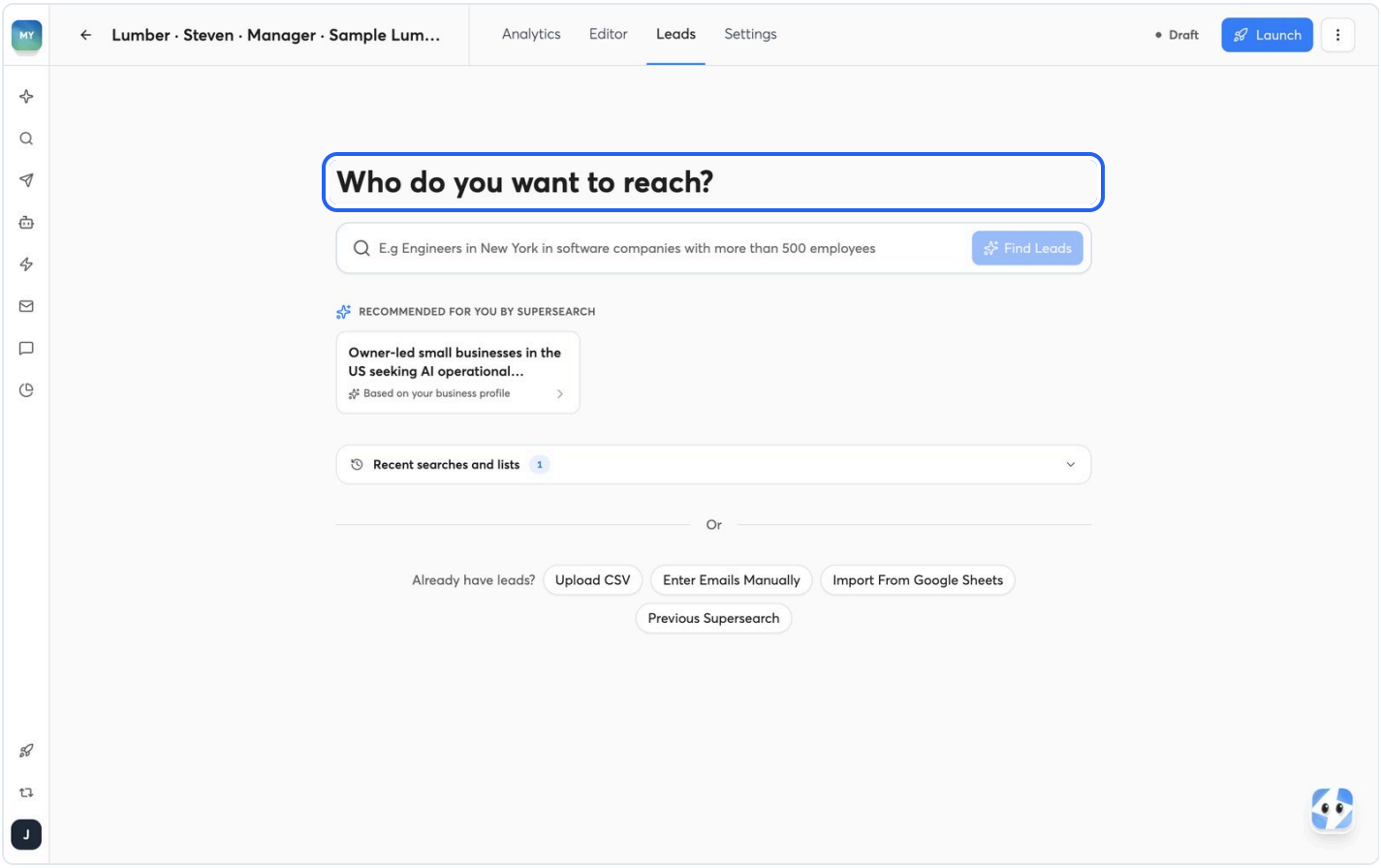
Open Engage in Instantly.

Click the campaign the list is for. A new campaign says Draft.



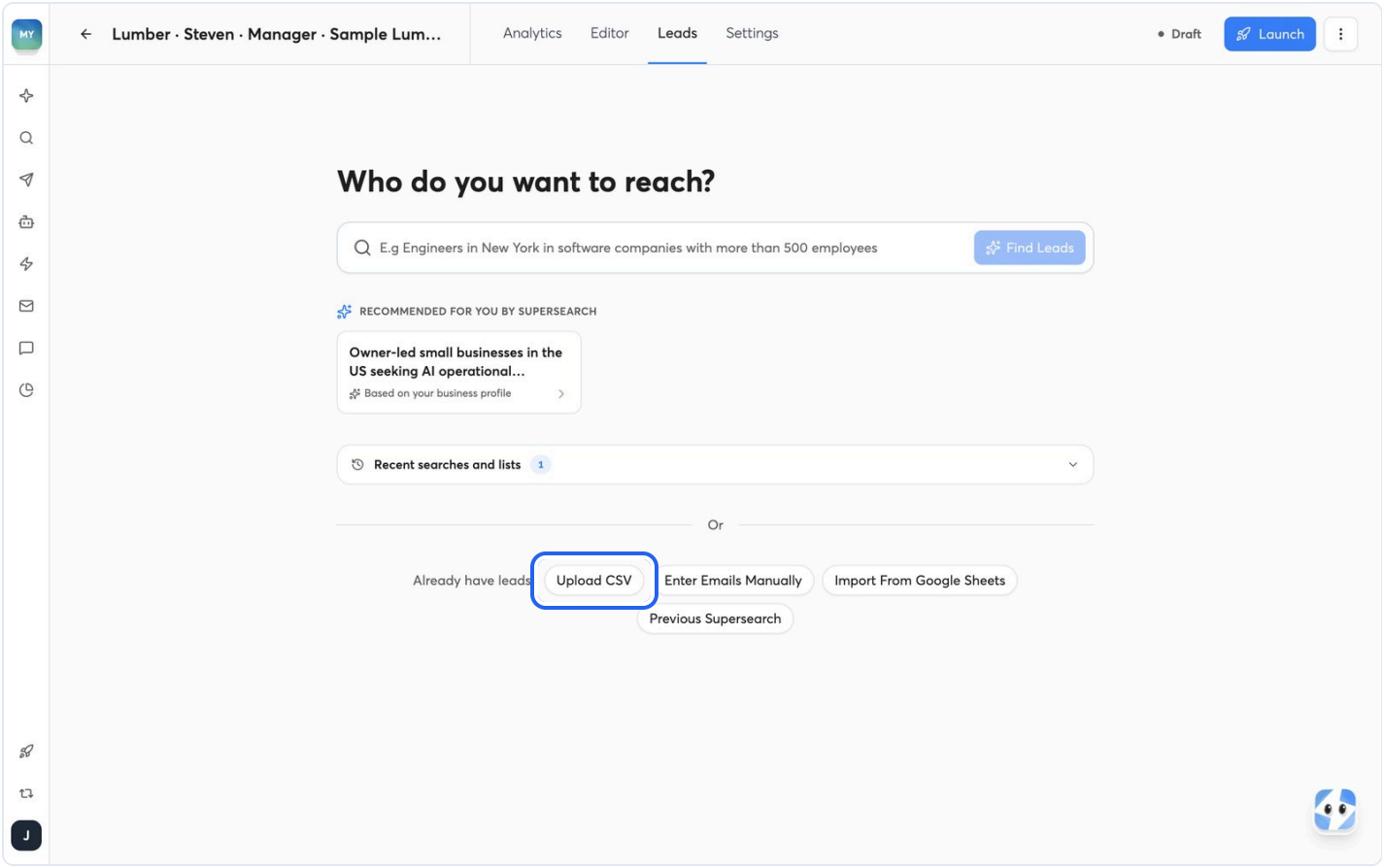
2 Open Leads

Open the Leads tab. An empty campaign asks who you want to reach.



3 Pick Upload CSV

Skip the search box. It finds new people in Instantly's own database, which uses paid credits. Your list is ready, so click Upload CSV.

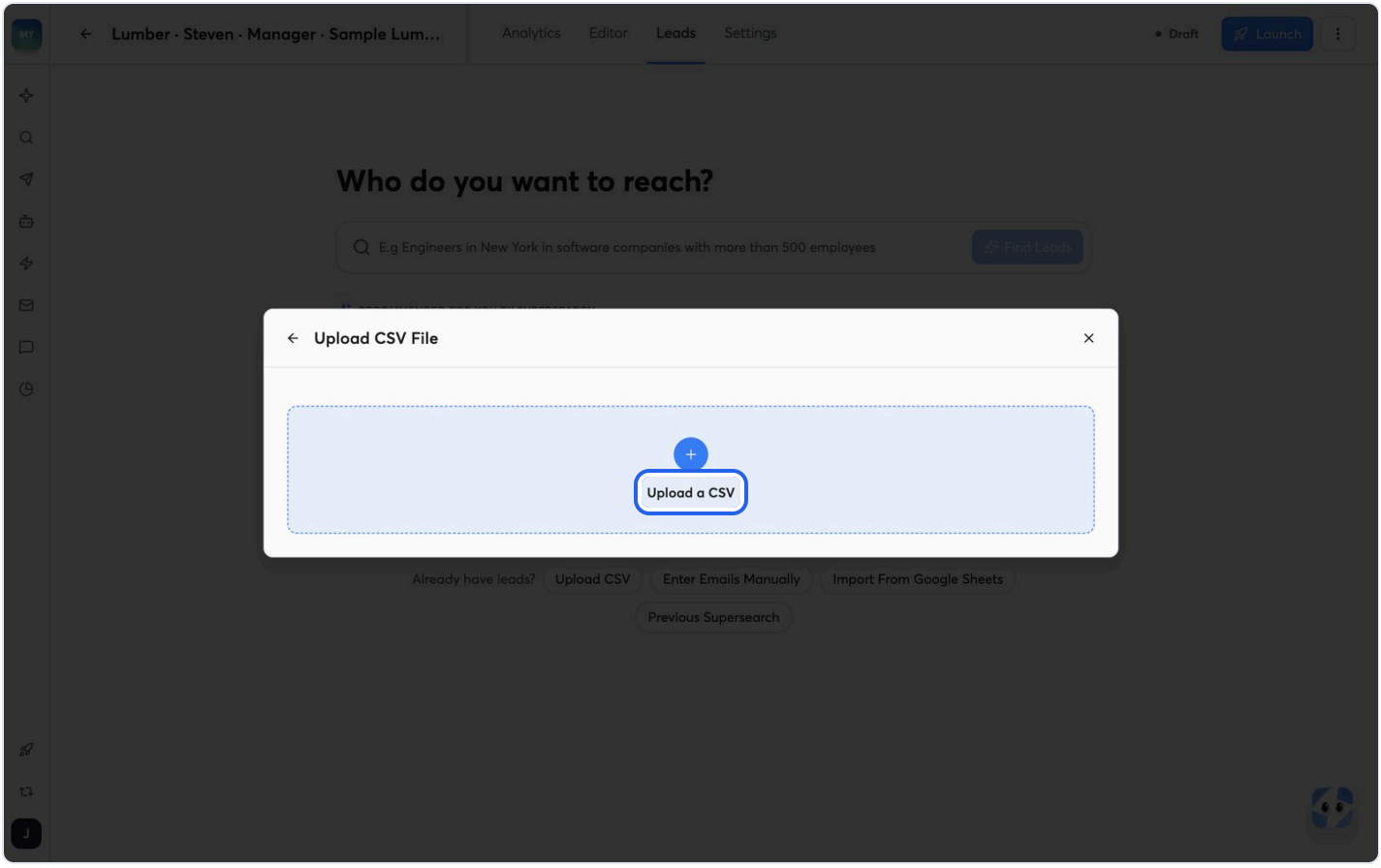


Tip. A CSV is a spreadsheet saved as plain text. In Google Sheets, use File, then Download, then Comma-separated values.

4 The upload screen

Upload a CSV opens. The file needs one line per person, with email, first name and company name. After you pick the file, match each column to its field, then confirm. This guide stops here.

Press Escape to leave without uploading anything.



> ⚠ **Watch out.** Add at most 5 people from one company per day. A new campaign starts with 50 people; wait 2 days and check bounces before you add more.

1 watch-out to keep in mind Before you click

> ⚠ Add at most 5 people from one company per day. A new campaign starts with 50 people; wait 2 days and check bounces before you add more.