

Migrating Contacts from Blitz to Lead Manager

Step 1: Exporting from Blitz

1. In Blitz, navigate to **Leads > Leads By Folder**.

In the **Select A Folder** dropdown, choose **All Folders**.

Tip: If there are more than 5,000 records to import, or you'd like to maintain the Folder names during the transfer, we suggest exporting each Folder separately by choosing a Folder in the dropdown at the top of the page (instead of "All Folders").

2. In the black bar, click **Column Options** and check any data that you would like to export. At a minimum you'll need to export:
 - a. Name First/Last
 - b. Address 1
 - c. City
 - d. State/Province
 - e. Zip

We recommend exporting ALL columns

The screenshot shows the Blitz interface with a 'Lead List' table and a 'Column Options' menu. The 'Column Options' menu is open, showing a grid of checkboxes for various columns. A callout box labeled 'Check every box' points to the 'Name First/Last' checkbox. Another callout box labeled 'Column Options' points to the 'Column Options' button in the black bar. A third callout box labeled 'Export button' points to the Excel icon in the black bar. The table below shows lead records with columns for Lead Id, Name, Folder, and other details.

Lead Id	Name	Folder	Assigned On	City	Web Site	Tags	Custom 7	Custom 14
46081232	Timothy Smith	QuoteWizard Auto leads						
48718384	Matt Murdock	Dalton Demo						
50380187	John Doe	Priscilla Referrals						
47415720	Lebron James							
48363919	Peter Parker	Dalton Demo	Sold	S.0 - Cross-Sell Home	Vince Broadway	6/9/2017 2:00:00 PM	4/5/2017 9:21:40 AM	

3. Click the Excel icon in the black bar to export the file. Save the file as a .CSV

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Step 2: Importing into Lead Manager

1. In Lead Manager, navigate to **Administration > Custom Fields**. Here you can rename up to 5 extra fields. We recommend using the custom fields for segmentation (i.e. Status, Milestone, and Assigned User) so you can group your leads the same way they were grouped in Blitz.
2. Next, navigate to **Administration > Import Leads**.
3. Click **Select** and locate the CSV file that you exported from Blitz in step 1. Click **Upload**.
4. In the **Lead Source** dropdown, select **Import Other** or **Customer** depending on the types of contacts you're uploading.
*Note: If there any Allstate customers on the list, select the **Customer** source to prevent them from being removed from Lead Manager.*
5. In the **Import Name** field, name the list something you will remember. You'll be able to search for the list by this name.
6. Map the fields from your spreadsheet into Lead Manager. The boxes stacked on the left are the column headers from your spreadsheet. The white boxes on the right are the fields in Lead Manager. Most of the fields will have automatically mapped to the correct places. To map any remaining fields, click on the boxes to the left, and drag and drop them into the corresponding white boxes on the right within each tab. For example, "Address" can be dragged to the "Lead Address 1" box.

Make sure to drag your segmentation data to the custom fields you renamed in step 1.

The screenshot shows the 'Import Leads' interface in Lead Manager. It features a 'Columns from Blitz Export' section on the left with a list of imported fields: Phone Number, Year Home Built, and Home Size. The main area contains a 'Pick Source' dropdown set to 'Customer', an 'Import Name' field, and an 'Initial Status' dropdown set to 'Cold'. An 'Export from other system' checkbox is also present. A blue 'Import' button is located at the top right. Below these fields are several tabs: Name, Address, Phone and Email, Other Details, Auto, Home, Custom, and History & Extra. The 'Name' tab is active, showing 'First Name: (Required)', 'Middle Name:', and 'Last Name: (Required)' fields. Callouts point to the 'Columns from Blitz Export' list, the 'Pick Source' dropdown, the 'Import Name' field, the 'Import' button, the 'Additional LM fields available in tabs' section, and the 'LM Fields' section.

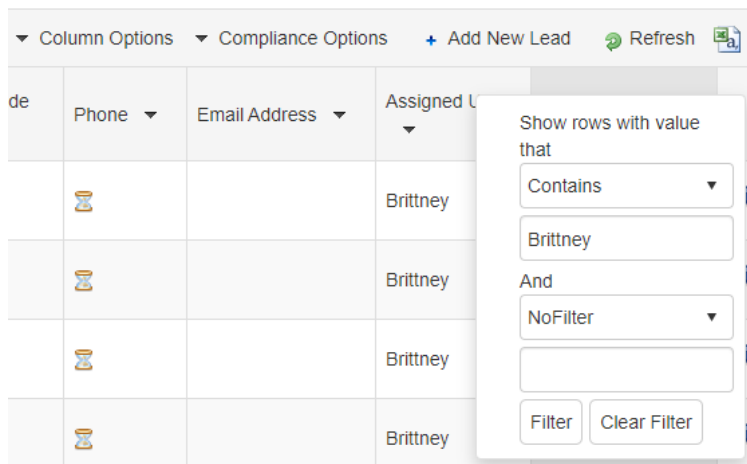
7. Click "Import."

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Step 3: Updating Leads in Lead Manager

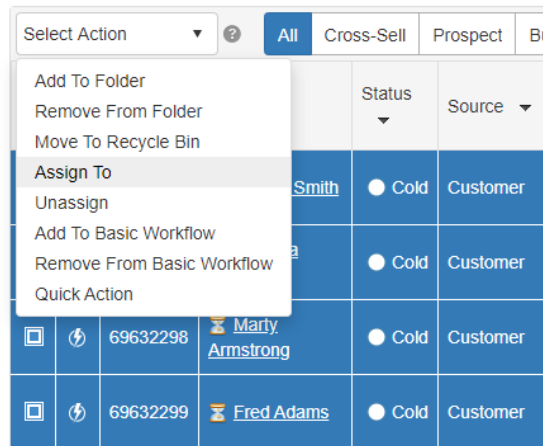
1. When leads are imported, by default they will be unassigned and set to “No Milestone.” To update leads in bulk, find your list(s) on the homepage under the **Import Names** header. Click on your list to open it.
*Alternatively, if you would like to update all leads in your account (multiple lists), go to **Leads > Leads – All > Imported** to open all imported lists.*

2. Assigning leads to the correct user:
 - a. Filter on the custom field you imported the assigned users. To do this:
 - i. Click **Column Options** then select the custom field the assigned users were imported into.
 - ii. Filter for one of the user’s names. In the below example, we filtered for rows that “Contains” “Brittney” then clicked **Filter**.



- b. Once the list is filtered to only leads to be assigned to a certain person, use the checkboxes to the left of the lead names to select all leads (the top checkbox will select all).
Tip: If there are more than 50 leads on the page, choose the Select All option on the top of the page.
- c. Above the checkboxes, in the **Select Action** dropdown, choose **Assign To**.

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The screenshot shows a table of leads with a context menu open over the first row. The table has columns for 'Select Action', 'All', 'Cross-Sell', 'Prospect', 'Bt', 'Status', and 'Source'. The context menu includes options like 'Add To Folder', 'Remove From Folder', 'Move To Recycle Bin', 'Assign To', 'Unassign', 'Add To Basic Workflow', 'Remove From Basic Workflow', and 'Quick Action'. The table data is as follows:

Select Action	All	Cross-Sell	Prospect	Bt	Status	Source
					Smith	Cold Customer
						Cold Customer
<input type="checkbox"/>	<input type="checkbox"/>	69632298	Marty Armstrong		Cold	Customer
<input type="checkbox"/>	<input type="checkbox"/>	69632299	Fred Adams		Cold	Customer

- d. In the popup window, choose the appropriate user in the dropdown and click **Assign the Leads**.

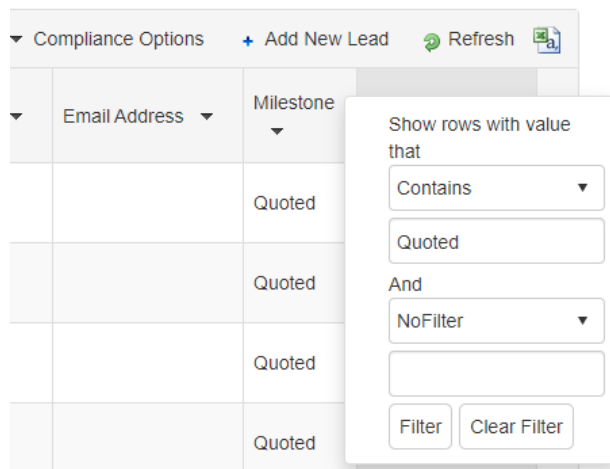
3. Applying the correct dispositions:

- a. Set up any necessary Quick Action by going to Administration > Quick Actions. You'll use Quick Actions to mass update each group of leads.

[Click here](#) for detailed instructions on setting up Quick Actions.

Tip: Avoid setting up Quick Actions that send emails or add appointments for this purpose, because those actions will be applied to every lead that is updated.

- b. Filter on the custom field you imported the dispositions (Status/Milestone). To do this:
 - i. Click **Column Options** then select the custom field the dispositions were imported into.
 - ii. Filter for one of the dispositions. In the below example, we filtered for rows that "Contains" "Quoted" then clicked **Filter**.



The screenshot shows a table with columns for 'Compliance Options', 'Add New Lead', 'Refresh', and 'a'. The table has columns for 'Email Address' and 'Milestone'. A filter dialog box is open over the 'Milestone' column, showing the filter criteria: 'Show rows with value that Contains Quoted And NoFilter'. The table data is as follows:

Compliance Options	Add New Lead	Refresh	a	Email Address	Milestone
					Quoted
					Quoted
					Quoted
					Quoted

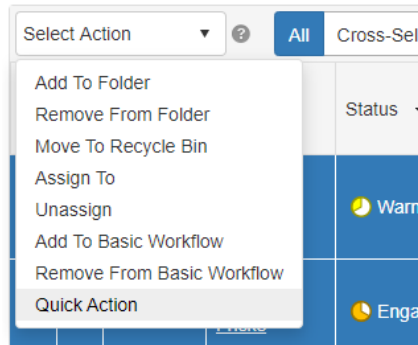
- i. Once the list is filtered to only leads with a specific disposition, use the checkboxes to the left of the lead names to select all leads (the top checkbox

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will select all).

Note: If there are more than 50 leads on the page, choose the Select All option on the top of the page.

- c. Above the checkboxes, in the **Select Action** dropdown, choose **Quick Action**.



- d. In the popup window, choose the appropriate Quick Action in the dropdown and click **Apply the Quick Action**.