Migrating Contacts to Lead Manager

Step 1: Exporting from Current System

When exporting from your current lead management system, make sure that you have the following information for each lead:

- Required for importing into Lead Manager:
  - First Name
  - Last Name
  - Address
  - City
  - State
  - Zip
- Recommended:
  - Assigned User
  - Any fields used to disposition or segment your leads (Status, Source, etc.)
  - Any other relevant information

Note: The exported file will need to be saved as a .CSV in order to import into Lead Manager.

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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 your current system.

2. Next, navigate to **Administration > Import Leads**.

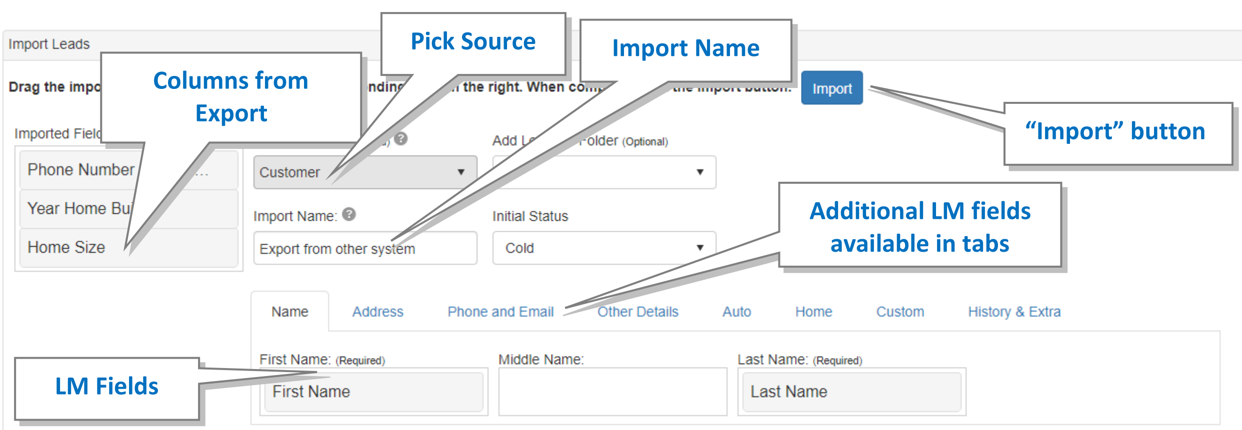
3. Click **Select** and locate the CSV file that you exported in step 1. Click **Upload**.

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.



7. Click "Import."

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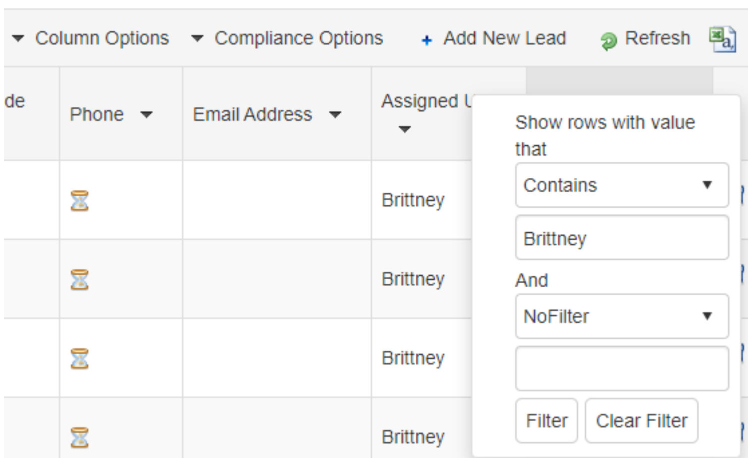
Step 3: Updating Leads in Lead Manager

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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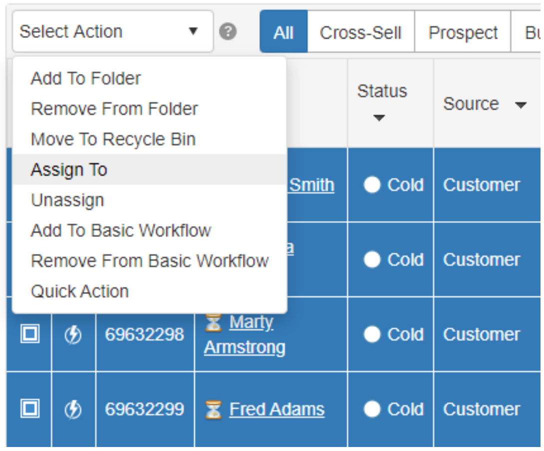
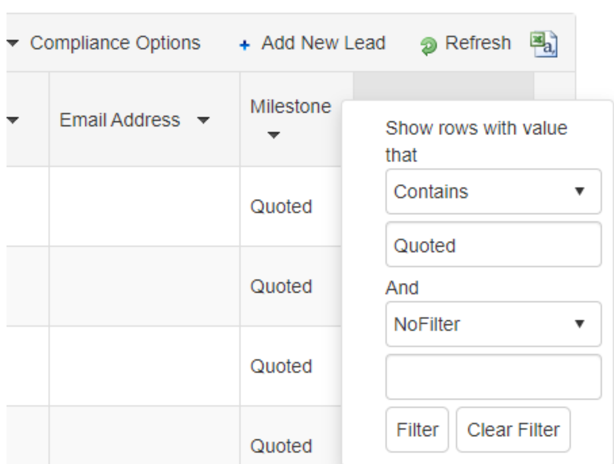


   d. In the popup window, choose the appropriate user in the dropdown and click **Assign the Leads**.

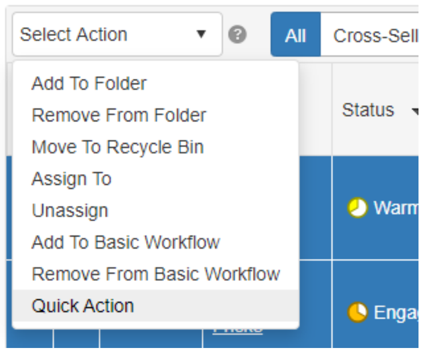
3. Applying the correct dispositions:
   a. Set up any necessary Quick Action by going to Administration > Quick Actions. You'll use Quick Actions to mass update each group of leads.
      [Click here](#) for detailed instructions on setting up Quick Actions.
      Tip: Avoid setting up Quick Actions 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**.



      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 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**.