
Changing Lead Source In Bulk

Posted by glenns - 2008/01/02 22:37

I've been trying to do a bulk lead source change and the action "Set a contact field to custom value" doesn't work for Leadsources. Anyone else had this problem? If so, how did you get around it?

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Re:Changing Lead Source In Bulk

Posted by rcarsello - 2008/01/04 02:04

Are you aware that you can select "quick edit leads" from the Actions drop down menu, after you do a Lead Search.

This doesn't edit all the records in one click, but it is a lot quicker.

Of course, we are all wondering how all of a sudden all these leads got into a different bucket in your sales cycle.

By the way, if these are all simply dead leads, you can use the same drop down menu to select "delete leads in Filter." When you do that, you non-ceremoniously and irreversibly delete all the leads that came up in your search.

That "delete" action is a one click wonder. Good riddance if they're just dead weight.

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Re:Changing Lead Source In Bulk

Posted by apalko - 2008/01/04 16:44

Yes, I have the same problem. An action sequence fails to change the leadsource even though it says that it was processed successfully.

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Re:Changing Lead Source In Bulk

Posted by glenns - 2008/01/04 17:18

Thanks for the replys.

Unfortunatley I'm working with Contacts not Leads. The reason I'm doing this is that you cannot delete an old lead source with contacts still attached to it.

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Re:Changing Lead Source In Bulk

Posted by arthurf - 2008/01/08 22:02

You can SET the lead source in bulk, but once a lead source is defined you cannot CHANGE it to something else through any sort of batch action. This is considered working as designed, as it is operating on the principle that once the lead source is initially set it's not supposed to change. It is designed to preserve this data from later being altered, mistakenly or otherwise, for this reason.

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Re:Changing Lead Source In Bulk

Posted by KAnderson - 2008/03/11 21:38

Try this.

Select the contacts that you want the leadsource field changed. Export the ContactID, Contact Name (not necessary but helps to view) and Leadsources to a CSV file. Open the CSV file in excel and change the Leadsources value to what you

want, save the file (as CSV again) then import the file back in to your InfusionCRM. Make sure you select the checkbox for "I want to update existing records" when you import back in to Infusion so the records are updated and not duplicated.

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Re:Changing Lead Source In Bulk

Posted by rcarsello - 2008/03/11 23:12

Is it that easy to import and export records from the CRM and make changes while the records are in the CSV file?

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Re:Changing Lead Source In Bulk

Posted by tgarns - 2008/03/12 00:01

Like Arthur mentioned, the leadsource is intended to never change once its set. This way you can analyze your marketing effectiveness over time because you can go back and look at "sources" of leads and determine how well they convert.

Instead of trying to change leadsources (unless they were set incorrectly), I would suggest using contact groups to manage subsequent response to your efforts.

At Infusion, we almost never remove contacts from groups. Instead we continue to add people to groups as they response to our various different marketing activities. This way we can see a "history" of how they've responded.

Another idea is to use groups like stages. When a prospect responds, remove them from a previous group and then add then to a new group that represents the next "stage" of your marketing.

Lastly, you can use opportunity stages for the same purpose.

Hopefully that helps.

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Re:Changing Lead Source In Bulk

Posted by sean - 2008/04/08 22:14

"once a lead source is defined you cannot CHANGE it to something else"

If only that were true. Do an import. Set leadsource. Then de-dupe. It overwrites both the created on date and the leadsource. Would be great if that did not happen.

Best,
Sean

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Re:Changing Lead Source In Bulk

Posted by justinm - 2008/04/18 00:33

When I am presented with the task of changing fields in bulk I write an application, I actually wrote an application a while back that did exactly what you are asking for, but since the API PCI Compliance changes it no longer works, maybe if I get the time some day I will update the code recompile it and put it here on the community.

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