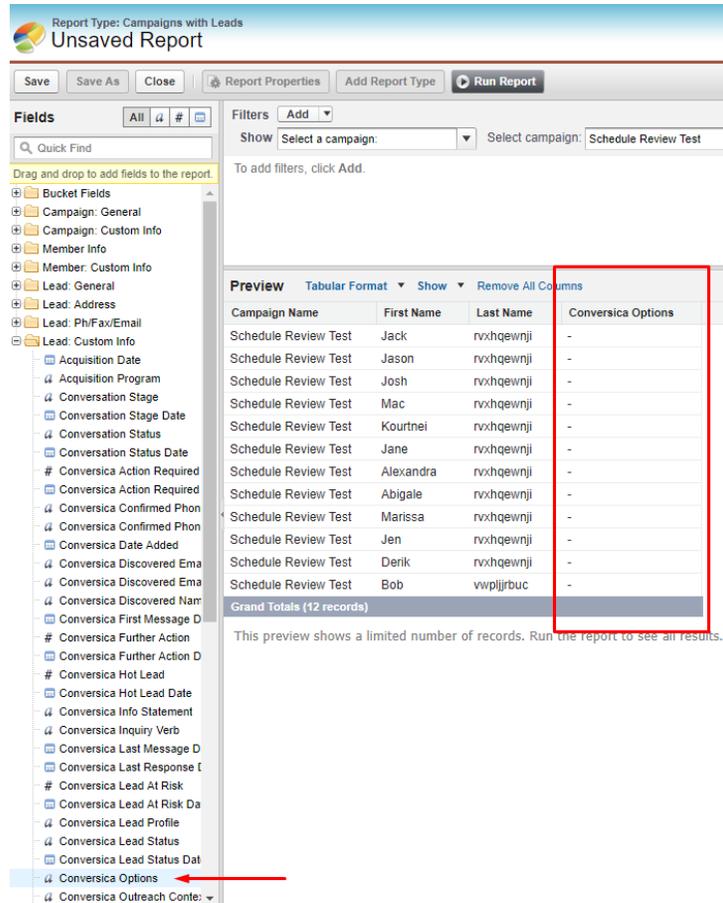


Bulk Stopping Leads in Salesforce

1. Pull a report from the Reports module with the Leads or Contacts on the campaign that you want to stop messaging. *Note: Be sure to include the **Conversica Options** field from the Lead or Contact record.



Report Type: Campaigns with Leads
Unsaved Report

Save Save As Close Report Properties Add Report Type Run Report

Fields All # #

Quick Find

Drag and drop to add fields to the report.

- Bucket Fields
- Campaign: General
- Campaign: Custom Info
- Member Info
- Member: Custom Info
- Lead: General
- Lead: Address
- Lead: Ph/Fax/Email
- Lead: Custom Info
- Acquisition Date
- Acquisition Program
- Conversation Stage
- Conversation Stage Date
- Conversation Status
- Conversation Status Date
- Conversica Action Required
- Conversica Action Required
- Conversica Confirmed Phon
- Conversica Confirmed Phon
- Conversica Date Added
- Conversica Discovered Ema
- Conversica Discovered Ema
- Conversica Discovered Nam
- Conversica First Message D
- Conversica Further Action
- Conversica Further Action D
- Conversica Hot Lead
- Conversica Hot Lead Date
- Conversica Info Statement
- Conversica Inquiry Verb
- Conversica Last Message D
- Conversica Last Response I
- Conversica Lead At Risk
- Conversica Lead At Risk Da
- Conversica Lead Profile
- Conversica Lead Status
- Conversica Lead Status Dat
- Conversica Options
- Conversica Outreach Conte

Filters Add

Show Select a campaign: Select campaign: Schedule Review Test

To add filters, click Add.

Preview Tabular Format Show Remove All Columns

Campaign Name	First Name	Last Name	Conversica Options
Schedule Review Test	Jack	rvxhgewnji	-
Schedule Review Test	Jason	rvxhgewnji	-
Schedule Review Test	Josh	rvxhgewnji	-
Schedule Review Test	Mac	rvxhgewnji	-
Schedule Review Test	Kourtnei	rvxhgewnji	-
Schedule Review Test	Jane	rvxhgewnji	-
Schedule Review Test	Alexandra	rvxhgewnji	-
Schedule Review Test	Abigale	rvxhgewnji	-
Schedule Review Test	Marissa	rvxhgewnji	-
Schedule Review Test	Jen	rvxhgewnji	-
Schedule Review Test	Derik	rvxhgewnji	-
Schedule Review Test	Bob	vwpljrbc	-
Grand Totals (12 records)			

This preview shows a limited number of records. Run the report to see all results.

2. Once you have the leads on the report, export the details as a csv file.

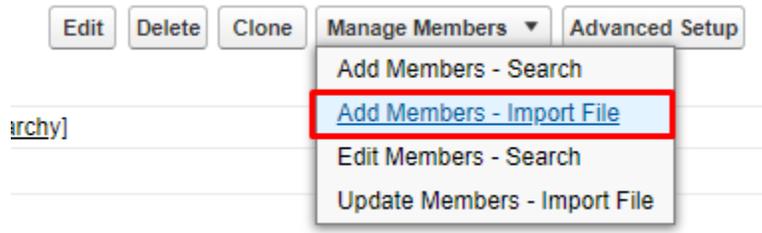


Run Report Hide Details Customize Save As Printable View Export Details Add to Campaign

3. Open the csv file and add the word "Stop" in the **Conversica Options** column for every lead. Make sure to save the file once completed.

	A	B	C	D
1	Campaign Name ▾	First Name ▾	Last Name ▾	Conversica Optio ▾
2	Schedule Review Test	Jack	rvxhqewnji	Stop
3	Schedule Review Test	Jason	rvxhqewnji	Stop
4	Schedule Review Test	Josh	rvxhqewnji	Stop
5	Schedule Review Test	Mac	rvxhqewnji	Stop
6	Schedule Review Test	Kourtnei	rvxhqewnji	Stop
7	Schedule Review Test	Jane	rvxhqewnji	Stop
8	Schedule Review Test	Alexandra	rvxhqewnji	Stop
9	Schedule Review Test	Abigale	rvxhqewnji	Stop
10	Schedule Review Test	Marissa	rvxhqewnji	Stop
11	Schedule Review Test	Jen	rvxhqewnji	Stop
12	Schedule Review Test	Derik	rvxhqewnji	Stop
13	Schedule Review Test	Bob	vwpljrrbuc	Stop
14				

- Navigate to the Campaign in your Salesforce org.
- Click on **Manage Members** and then **Add Members – Import File**, from the drop down.



- Select, **Leads, Update Existing Records, CSV**. Click on **Choose File** and navigate to the CSV file you saved in Step 3. Click **Next**.

Getting closer

Choose data Edit mapping Start import

Import your Data into Salesforce

You can import up to 50,000 records at a time. [Help for this page](#)

What kind of data are you importing?

Standard objects	Custom objects
Accounts and Contacts	
Person Accounts	
Leads	
Campaign Members	

What do you want to do?

Add new records

Update existing records

Match Lead by: Name

Assign All Leads Using this Assignment Rule: --None--

Use Assignment Rules to Email Owners?

Assign All Leads to Campaigns?

Trigger workflow rules and processes?

Add new and update existing records

Where is your data located?

Drag CSV file here to upload

CSV

FILE

Choose File | No file chosen

Character Code: ISO-8859-1 (General US & Western European, ISO-LATIN-1)

Values Separated By: Comma

Outlook CSV

ACT! CSV

GMail CSV

Cancel Previous **Next**

7. Verify the mapped fields match up correctly and click **Next**.

Edit Field Mapping: Leads

Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.

Edit	Mapped Salesforce Object	CSV Header	Example
Change	Last Name	Last Name	klovpfacv
Change	First Name	First Name	Blake
Change	Email	Email	blake.hamrick@conversica.com
Map	Unmapped	Source	Test Lead
Change	Company	Company	

- Click **Start Import**.
- You can now spot check a few of the leads you are wanting stopped and make sure the Conversica Options field says Stop. *Note, after approx. 10 minutes the Conversica Options field will automatically revert to None (blank).