Bulk Import Leads Feature - Implementation Summary

Overview

A powerful new feature that allows sales teams to quickly import multiple leads from plain text data and automatically generate draft proposals based on service keywords.

What Was Implemented

1. Intelligent Lead Parser (`lib/bulk-import-parser.ts`)

- **Smart Text Parsing**: Automatically extracts contact information from unstructured text
- Name detection (first contact in each line)
- Email extraction using regex patterns
- Phone number extraction (supports multiple formats: 876-541-3595, (876) 541-3595, etc.)
- Company name detection (looks for business entities like “Ltd”, “Inc”, “Corp”, etc.)
- Service needs identification

- **Service Keyword Mapping**: Recognizes service keywords and maps them to CDM Suite offerings

- Website → Web Development (Starter tier)
- SEO → SEO Services (Local Basic tier)
- Google Ads → Ad Management (Starter tier)
- Social Media → Social Media Management (Basic tier)
- Marketing → Ad Management + Social Media (Growth tier)
- Lead Gen/Lead Generation → Ad Management + SEO (Growth tier)
- AI Integration → App Creation + Web Development (Growth tier)
- And more...

2. Bulk Import API (`app/api/crm/leads/bulk-import/route.ts`)

- **POST /api/crm/leads/bulk-import**
- Processes bulk text data
- Creates/updates leads in the CRM
- Auto-generates draft proposals based on service keywords
- Handles errors gracefully with detailed feedback
- Creates activity logs for all actions
- Prevents duplicate leads (checks by email)

3. User Interface (`components/crm/bulk-import-dialog.tsx`)

- Clean, intuitive dialog interface
- Large textarea for pasting bulk data
- Real-time line counter
- Option to toggle proposal auto-generation
- Visual keyword reference guide

- Detailed success/error reporting
- Shows counts of leads imported and proposals created

4. CRM Integration

- Added “Bulk Import” button to the Lead CRM page
- New lead source: “Bulk Import” with proper tracking
- Automatic lead scoring for imported leads
- Activity timeline tracking

How to Use

Step 1: Access Bulk Import

1. Navigate to **Dashboard → Lead CRM**
2. Click the **“Bulk Import”** button in the top toolbar

Step 2: Prepare Your Data

Each line should contain contact information in any order:

```
Name - Company, Phone, Email, Service Needs
```

Example Format:

```
Mr Irving - Alternative shipping & courier, marketing needs, 876-541-3595, autoaltern-
atives@hotmail.com
Fernette Williams - marketing needs, Gr8 Grocers meats & more, 876-543-6046
Denise Morris - HDRN Consulting ltd, 876-543-3799, marketing needs
MayAnna Francis - comcare optical lab ltd, 876-533-8583, website & domain, uiewearja@g
mail.com
```

Step 3: Paste and Import

1. Paste your lead data into the text area
2. Review the line count to verify all leads are included
3. Keep “Auto-generate draft proposals” checked (recommended)
4. Click **“Import Leads”**

Step 4: Review Results

- See how many leads were imported
- See how many proposals were generated
- Review any errors or warnings
- Leads are automatically added to the CRM
- Proposals appear in draft status

Step 5: Action the Leads

1. Go to the Lead CRM to see your new leads
2. Navigate to **Dashboard → Proposals** to review draft proposals
3. Customize proposals before sending to clients
4. Assign leads to team members
5. Follow up using the CRM tools

Recognized Service Keywords

The system automatically recognizes these keywords and generates appropriate proposals:

Keyword	Maps To	Starting Price
website, basic website	Web Development	$420
custom website	Web Development (Growth)	$975
domain	Web Dev + Maintenance	$420
SEO	SEO Services	$175/mo
Google Ads	Ad Management	$250/mo
social media	Social Media Management	$200/mo
social management	Social Media (Growth)	$490/mo
marketing, marketing needs	Ad Management + Social	$550/mo
lead gen, lead generation	Ad Management + SEO	$600/mo
AI integration	App Creation + Web Dev	$3,750
app, mobile app	App Creation	$1,225+

Features & Benefits

For Sales Teams

✓ **Save Hours of Data Entry**: Import dozens of leads in seconds
✓ **Auto-Generate Proposals**: Proposals are created automatically based on service needs
✓ **Consistent Lead Capture**: All leads are properly formatted and stored
✓ **Immediate Action**: Sales team can review and customize proposals right away
✓ **No Lost Leads**: All leads are tracked with full activity history

For Managers

✓ **Faster Lead Processing**: From contact to proposal in minutes
✓ **Better Lead Attribution**: Track that leads came from bulk import
✓ **Quality Control**: Review all imports through the CRM
✓ **Performance Metrics**: See how many proposals are generated from imports

Technical Features

✓ **Smart Parsing**: Handles various formats and missing data
✓ **Duplicate Detection**: Won't create duplicate leads (checks by email)
✓ **Error Handling**: Clear error messages for problematic data
✓ **Activity Tracking**: Full audit trail of all imports
✓ **Scalable**: Can handle hundreds of leads in a single import

Example Use Cases

1. Trade Show Follow-up

After a trade show, you collected business cards and notes. Simply type or paste them:

```
John Smith - Tech Solutions Inc, 555-1234, john@techsol.com, needs website and SEO
Sarah Jones - Retail Plus, 555-5678, needs social media marketing
Mike Brown - 555-9012, manufacturing company, wants lead generation
```

2. Referral Batch Processing

A partner sends you a list of referrals:

```
Client A - referred by Partner X, basic website, 876-123-4567
Client B - Agency Name, social media + Google ads, client@email.com
Client C - Startup looking for complete marketing package
```

3. Outreach Campaign Results

After a calling campaign, import the interested prospects:

```
Prospect 1 - Company A, 555-0001, interested in SEO and content
Prospect 2 - Company B, 555-0002, wants app development
Prospect 3 - Company C, needs website redesign
```

Best Practices

Data Preparation

1. **One Lead Per Line**: Each line should contain one contact
2. **Include Key Info**: At minimum, name and one way to contact (email or phone)
3. **Mention Services**: Include keywords for services they need
4. **Company Names**: Include company names when available
5. **Clean Data**: Remove extra line breaks and formatting

After Import

1. **Review Leads**: Check the CRM to verify all leads imported correctly
2. **Customize Proposals**: Edit proposals to add personalization
3. **Assign Leads**: Assign leads to appropriate team members
4. **Set Follow-ups**: Schedule follow-up tasks
5. **Update Status**: Move leads through the pipeline as you engage them

Tips for Success

- Start with a small test batch to ensure formatting is correct
- Use the keyword reference in the dialog to guide your descriptions
- Review the generated proposals before sending them to clients
- Update lead priorities based on urgency and potential
- Add notes to leads with context about where they came from

Error Handling

The system provides clear feedback if there are issues:

- **No Valid Leads Found**: Check your formatting and try again
- **Missing Required Info**: At least a name is required for each lead
- **Proposal Generation Failed**: The lead is still created, but check the error message
- **Duplicate Lead**: System will update the existing lead instead of creating a duplicate

Technical Details

Data Processing Flow

1. Text is split by lines
2. Each line is parsed for contact info and keywords
3. Leads are checked for duplicates
4. New leads are created or existing ones are updated
5. Service keywords are mapped to proposal items
6. Draft proposals are generated with appropriate pricing
7. Activity logs are created
8. Success/error report is returned

Security

- Only admin and employee users can bulk import
- All imports are logged with user attribution
- Duplicate detection prevents data pollution
- Full audit trail maintained

Performance

- Can handle hundreds of leads in one import
- Asynchronous processing for better performance
- Graceful degradation if some leads fail
- Detailed error reporting for failed records

Files Modified/Created

New Files

- `lib/bulk-import-parser.ts` - Smart text parsing and service mapping
- `app/api/crm/leads/bulk-import/route.ts` - API endpoint for bulk import
- `components/crm/bulk-import-dialog.tsx` - UI component for bulk import

Modified Files

- `app/dashboard/crm/page.tsx` - Added bulk import button and dialog
- `lib/crm-utils.ts` - Added ‘bulk-import’ lead source

Next Steps

Future Enhancements (Optional)

- CSV file upload support
- Excel file import
- Custom field mapping
- Bulk lead assignment
- Automated email sequences for imported leads
- Import templates for different sources
- Integration with external contact management tools

Questions?

If you have questions about using the bulk import feature, contact your system administrator or refer to the CRM documentation.

Last Updated: October 15, 2025
Version: 1.0