

Add a Marketing Source

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Marketing Sources are used to identify how a sales lead learned about your company, or how a salesperson learned about a sales lead. When creating a new proposal, the Marketing Source is a required field.

To add a new Marketing Source, from the main menu, arrive at the Marketing Sources setup with this path: Setup > Proposals > Marketing Sources.

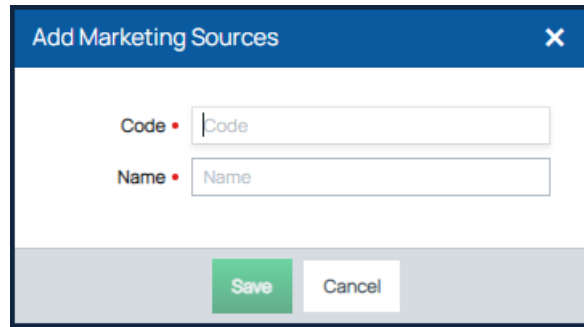
The Marketing Sources list will be displayed. There are two tabs on this page; Primary Marketing Sources and Secondary Marketing Sources. The Secondary Marketing Sources are for future development. Click on the Primary Marketing Sources tab, and then click on the Add Primary Marketing Source button at the upper left of the page.

Code	Name	Action
Google	Google	Edit Delete
Social Media	Social Media	Edit Delete
Advertisements	Advertisements	Edit Delete
Yellow Pages	Yellow Pages	Edit Delete
TV	TV	Edit Delete
Consumer Reviews	Consumer Reviews	Edit Delete
Event	Event	Edit Delete
Mail	Mail	Edit Delete
Email	Email	Edit Delete
Radio	Radio	Edit Delete
Referral	Referral	Edit Delete
Cold Call	Cold Call	Edit Delete
Yard Sign	Yard Sign	Edit Delete
Existing Customer	Existing Customer	Edit Delete
Other	Other	Edit Delete

The Add Marketing Sources form will be displayed. The data entry fields are described below - both fields are required.

- **Code** - Enter a brief description: A maximum of 25 characters is allowed.
- **Name** - Enter a detailed description: A maximum of 50 characters is allowed.

When finished, click the Save button at the bottom of the form.



The image shows a dialog box titled "Add Marketing Sources" with a close button (X) in the top right corner. The dialog contains two input fields: "Code" and "Name". The "Code" field has the text "Code" inside it, and the "Name" field has the text "Name" inside it. At the bottom of the dialog, there are two buttons: "Save" (a green button) and "Cancel" (a white button with a grey border).