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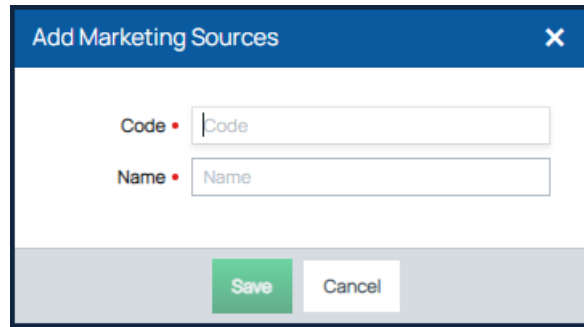
The Marketing Sources list will be displayed. There are two tabs on this page; Primary Marketing Sources and Secondary Marketing Sources. The Secondary Marketing Sources are for future development. Click on the Primary Marketing Sources tab, and then click on the Add Primary Marketing Source button at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

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.

Add Marketing Sources

Code • | Code

Name • | Name

Save   Cancel