

Lead Management

Last Modified on 03/17/2025 3:13 pm EDT

Lead management functionality includes the ability to create and edit leads that have basic contact information (such as name, address, phone number(s), etc.); the overall disposition of the lead; stage of the sales opportunity associated with the lead; source of the lead; notes; documents (any documents transfer when the lead becomes an active customer); contacts; and a follow-up date for tracking the next action item. To find the Leads page, navigate to CRM > Leads.

Lead	Entry Date	Heat	Stage	Follow Up Date	Open Ar	Open R#	Email	Cell Phone	Work Phon	Department	Primary Salespi	Created By	Tags
Adams, Justin	Jun 6, 2018, ...	Warm	Demo	Jun 11, 2018, 8:00...	\$6,752.40	\$450.00	justind@perennia...	(440) 773-1673	(440) 773-16...	It	Utley, Thomas	Jeff Gaetjens	HOT LEAD
All Electronics	Jun 6, 2018, 4...	Warm			\$276.28	\$60.00	jeffg@perennials...		(23) 456-76...	It	Utley, Thomas	Thomas Utley	
Barrak, Shahed	Jun 5, 2018, 2...	Warm		Jun 7, 2018, 8:00...	\$110.70	\$30.00	shahedb@perenn...			Sales	Salim, Laurie	Thomas Utley	FireCustomer
Brown, Dan	Aug 18, 2020...	Warm	New Oppo...		\$299.10	\$0.00	ndujiqueen@gma...			It	Nduji, Queen		
Byrde, Marty	Sep 25, 2018...	Warm	Followup		\$766.09	\$0.00		(23) 456-7890		Support	Gaetjens, Jeff	Shahed Barrak	
Cocker, Alta	Jun 5, 2018, 4...	Warm	Second D...	Jun 4, 2018, 8:00...	\$0.00	\$0.00	Mkmarks@me.com	(678) 676-7868	(355) 355-55...	It	Utley, Thomas	Jeff Gaetjens	HOT LEAD
Cocker, Alta	Jun 14, 2018, ...	Warm	Followup		\$0.00	\$0.00	Mkmarks@me.com	(678) 676-7868	(355) 355-55...	It	Tester, Fred	Fred Tester	
Creation, SA	Jun 7, 2018, 8...	Warm			\$110.70	\$30.00	jeffg@perennials...		(111) 111-1111	It	Gaetjens, Jeff	Jeff Gaetjens	
Custom Dev, Test	Mar 29, 2021...	Warm	New Oppo...		\$358.56	\$30.00			(555) 555-12...	Support	Utley, Thomas	Thomas Utley	
Customer, Master	Jun 7, 2018, 9...	Warm			\$0.00	\$0.00	test@email.com			Support	Gaetjens, Jeff	Jeff Gaetjens	
Customer, Master3	Aug 24, 2018...	Warm	Demo	Aug 23, 2018, 8:00...	\$509.36	\$30.00	test@email.com			Support	Gaetjens, Jeff	Jeff Gaetjens	HOT LEAD
Dracer, Donald	Sep 7, 2018, 2...	Hot	Demo	Sep 10, 2018, 8:00...	\$0.00	\$0.00	Shahedb@peren...			Support	Gaetjens, Jeff	Thomas Utley	HOT LEAD
Dude, Test	Jun 6, 2018, 1...	Warm	Demo		\$0.00	\$0.00	Jeffg@perennials...		(111) 111-1111	It	Utley, Thomas	Thomas Utley	
Hyland Software, f	Jul 27, 2018, 1...	Hot	Demo		\$1,939.50	\$0.00	patef@perennials...		(440) 552-2...	It	Tester, Fred	Thomas Utley	New Customer

To create a new lead, click the **New Lead** button. To open an existing lead, click the hyperlink in the Lead column in the grid.

New Lead Page

New Lead [Save] [Cancel]

Choose Master Customer No

Select Existing Customer Customer Search: name - cust #

Full Name First Name Last Name

And/Or Business Name

Email

And/Or Phone () - - Ext

Cell Phone () - -

Address Address1

Address 2

City Ontario 54321 - Plus...

Pipeline & Assignments

Heat Cold Warm Hot

Stage Please Select

Primary Source Please Select

Secondary Source Please Select

Follow Up Date 12/11/2024 1:38 PM

Tags

Department IT

Primary Salesperson Please Select

Secondary Salesperson Please Select

Branch

Comments

When entering a new lead, enter or choose this information:

Choose an existing master customer or an existing customer. If the lead is not for an existing customer, type these details: First name and Last name or Business name (or both); Email address or Phone number (or both).

Address: If you choose an existing customer, the address fills in automatically from the customer record.

Sync To Customer: If set to YES, any changes to the contact or address will be updated in the associated customer record. This is a one-way synchronization from the lead to the customer.

Heat: Choose the interest the lead has in purchasing your company's service or product.

***Stage:** Choose a stage for the lead. These come from Setup > Lead Setup > Lead Stages.

***Primary Source:** This is the origin of the lead. These come from Setup > Proposals > Marketing Sources > Primary Marketing Sources tab.

Secondary Source: These come from Setup > Proposals > Marketing Sources > Secondary Marketing Sources tab.

Follow Up Date: Select a date to follow up on the lead.

Tags: Choose an existing tag for the lead (these come from Setup > Operations > Tags) or click the plus beside the field to add a tag.

***Department:** This shows all active departments. These come from CRM > Departments.

***Primary Salesperson:** These come from the salespeople on the selected Department.

Secondary Salesperson: These are salespeople who are marked as a salesperson in the Employees list (Setup > Company > Employees).

***Branch:** Select a branch for the lead. (Branches are a feature in Managely Pro)

Comments: This is a free field for comments and notes.
