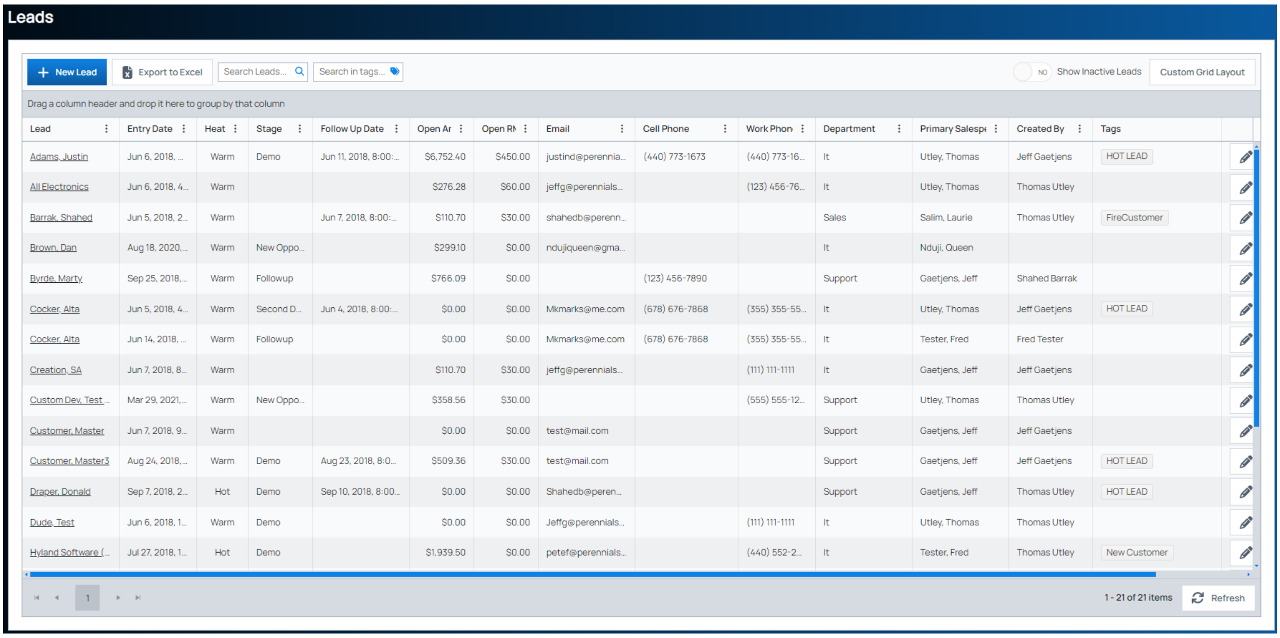
Lead Management

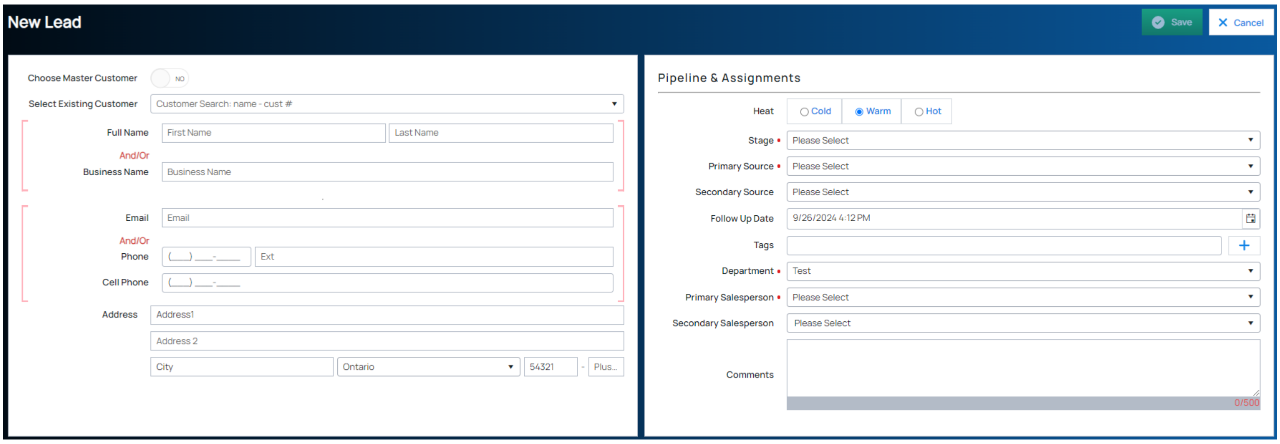
Last Modified on 11/01/2024 4:31 pm EDT

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; contacts; and a follow-up date for tracking the next action item. To find the Leads page, navigate to CRM > Leads.



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



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.

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).

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