

Lead Setup

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Setup the following details that will be key in classifying your leads throughout the workflow. Navigate to the lead setup menu.

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Marketing Sources: Define primary and secondary marketing sources that identify where your leads originated from (e.g. website, conference, cold call, etc.). When adding a new source, give each source a name and code. Once you have created a source, you will have the option to edit or delete as needed.

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Lead stages: Define the stage in your company's sales workflow or pipeline that your lead can move through. When adding a new source, give the stage a name and a brief description (e.g. Stage: Connect; Description: Initial phone call to gather information). Once you have created a stage, you will have the option to edit or delete as needed. These stages will be manually updated by the assigned salesperson as the lead moves through the sales workflow and can be used to filter or sort through your leads.

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Tags: Use tags to assign attributes to your leads based on the details most helpful to you. You can use tags as a way to subgroup your leads for future reporting. For example, you can create a tag to quickly identify the type of business the lead is in (security system, fire, etc.). When adding a new tag, give it a name and assign it to an entity (choose between "Lead" or "Task" - this is where the tag will show up again later). Once you have created a tag, you will have the option to edit or delete as needed. Tags can also be added on the spot as you are setting up leads or tasks.

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