Lead Generation to Qualification

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Obtaining a New Lead

Creating a new lead in Sales Automation requires you to develop a profile for each new lead. This profile contains all the information associated with the respective lead from the time they are identified as a potential customer through the rest of the workflow.

From the Sales Automation homepage, select “New Lead” on the left-hand navigation to begin entering a new lead. You have the option of entering new customer information or selecting an existing customer from SedonaOffice/AlarmBiller to populate the information. A lead may already be an existing customer if that customer is using a different product or service you offer. Complete the required information and save.

SedonaOffice users also have the option to choose a Master Customer. Selecting this option reveals a dropdown menu to choose from. This links the lead to a master customer in SedonaOffice.

Full View of All Leads

View all your leads in one place using the Listing View (list of all leads). Customize the Listing View by adding, removing, or grouping columns and save your custom layout by adding it as a "View" for future use. You can also easily find who you’re looking for using the search bar.

You can also view your leads using the Kanban View. This view groups leads by Stage using a Kanban layout.

Qualifying a Lead

As the sales team qualifies the lead, the stage will change. Update the stage in the profile of the lead as they move through the workflow stages. The comments field gives you the opportunity to add more detail to the customer profile as you move through the workflow. Also, adding “Notes” to a lead and flagging them as critical automatically prompts the tool to display a reminder about the note each time you open application until the expiration date has passed.