BluWave CRM- Leads Management

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1. Introduction

Leads are raw contacts with which you no pre-existing relationship with. Only once you do contact them, they could be converted to a company (if they are a viable potential customer referred to as a Prospect); only once it has been converted would you be able to create activities or opportunities for this company.

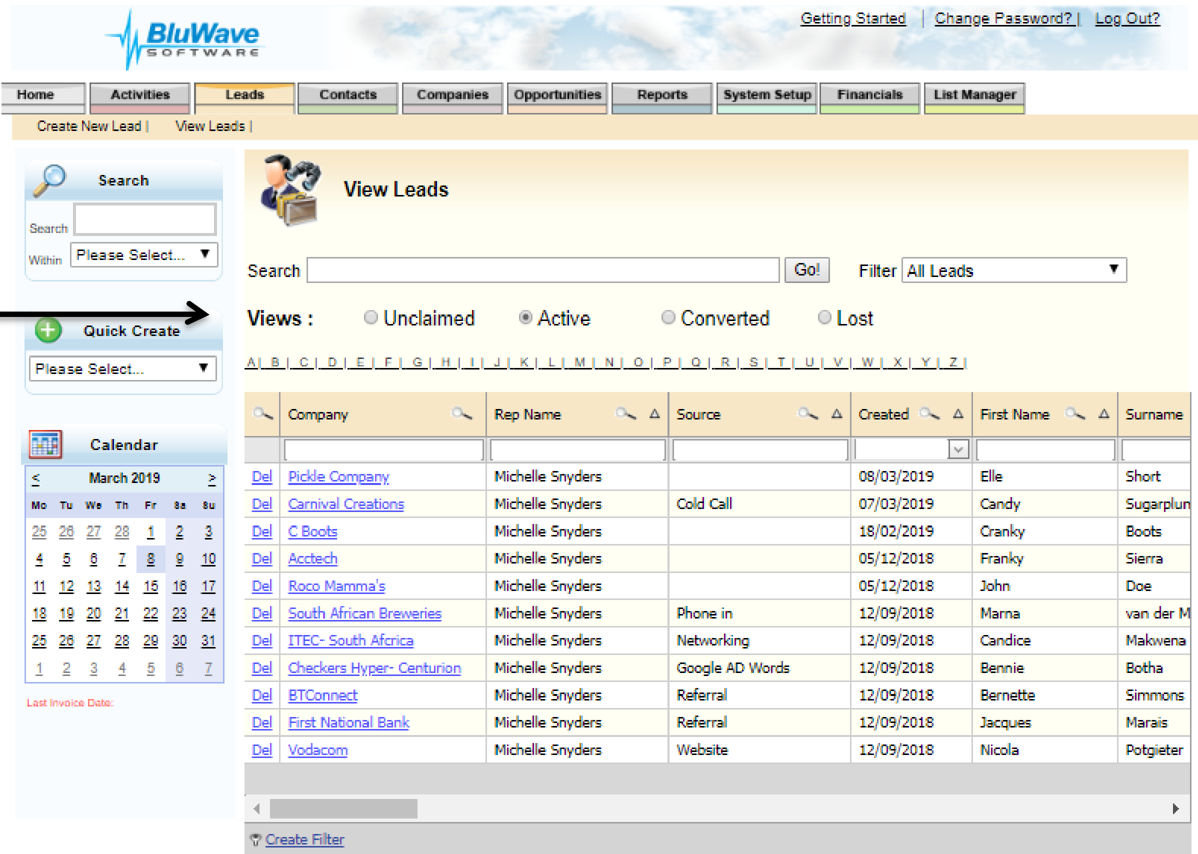
1.1 View Leads

When you click on the **Leads** tab, the **View Leads** page will show by default.

There are four sections to the view page (depending on whether or not you company allows the sales staff to claim leads):

- Unclaimed - all the leads that are not yet allocated to a specific sales staff.
- Active - leads that still need to be contacted by the specified sales staff.
- Converted - all the leads that were contacted and added to the Company list.
- Lost - all the leads that were contacted but were not interested/viable.

Below is a screenshot of the **Active** portion of the **View Leads** page.

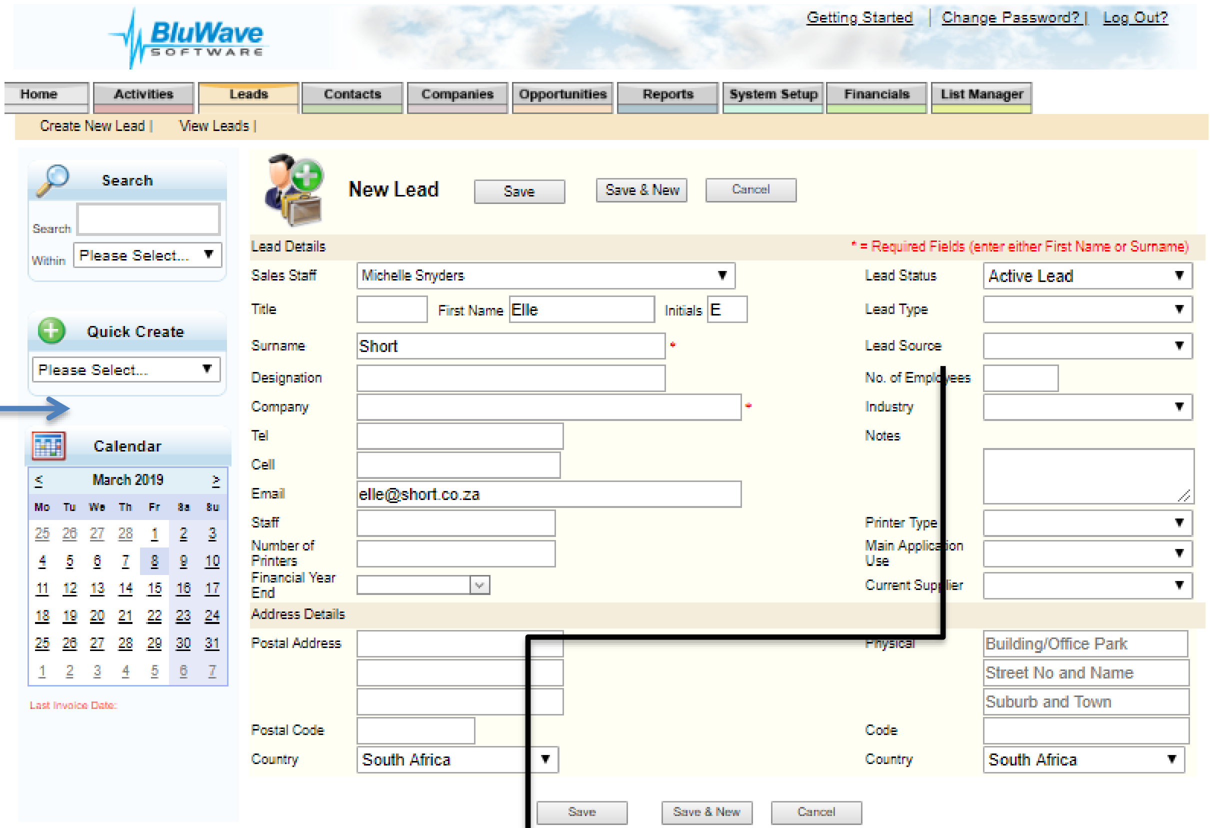


1.2 Add Leads

To Add a new Lead to your database:

- Select **Lead** from the **Quick Create** dropdown
- Click on the **Create New Lead** on the **Leads** tab

The **New Lead** page will open; the user will enter all the required/available information regarding the contact.



Fields marked with an *, are mandatory.

Lead Type & **Lead Source**, is populated according to your companies requirements.

The fields are related to your company user defined fields.

To save the information entered, click on **Save** to return the **View Leads** page or click on **Save & New** to bring up a blank page for **New Leads** to add a consecutive lead.

1.3 Edit Leads

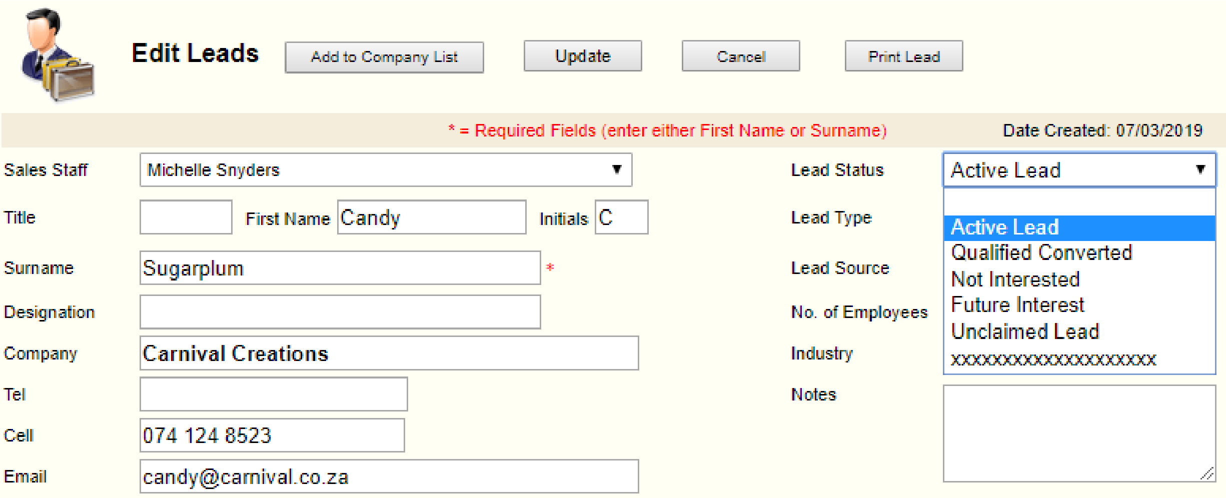
To edit a lead, click on the Company Name on the **View Leads** screen.

When editing a lead, the use will be able to update the lead details or convert the lead to a company.

If the user is only updating the lead information the User would click on the **Update** button, after making the relevant changes.

Changes can include updating the contact details or source and type information. The user would also be able to update the Status of the lead.

The statuses can be set-up as needed, however it would have an **active status**, which means the client still needs to be contacted and qualified (either immediately or in the future); a **sold/won status**, in our case the Qualified Converted status that means the lead has be qualified and converted to a company; a **lost status** that would move them to the lost view.



1.3.1 Converting a Lead to a Company

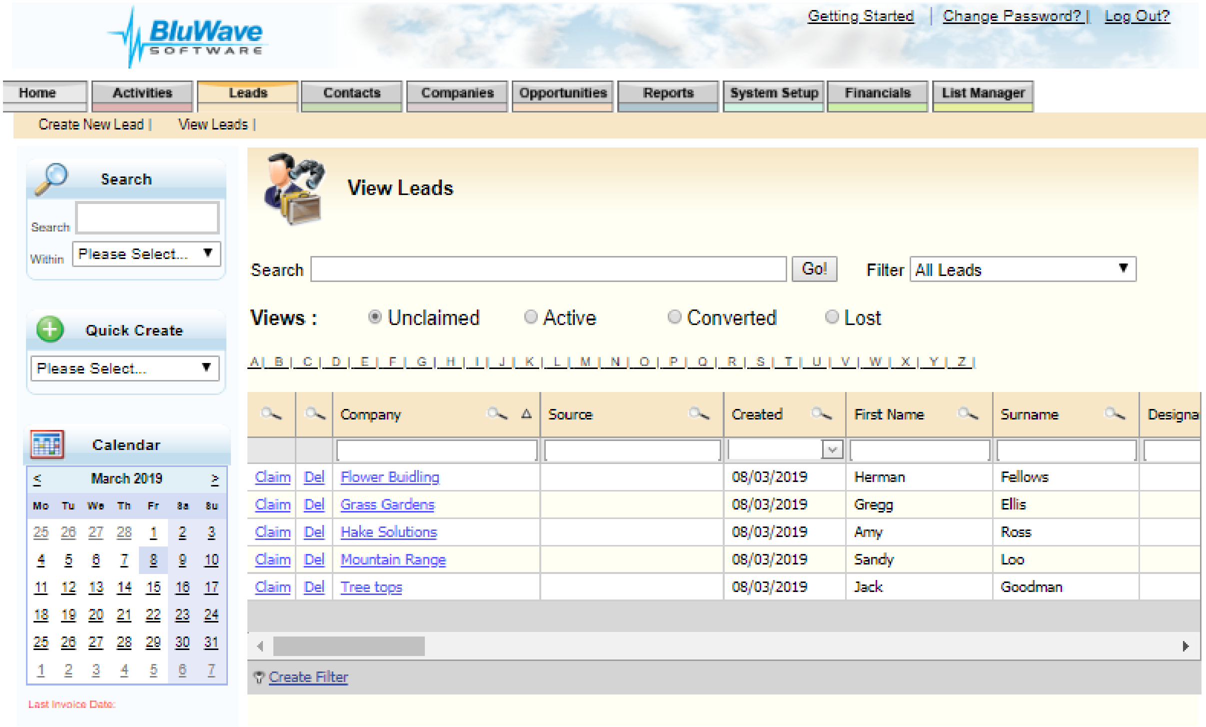
When a lead has been qualified the user could easily convert the lead to a company, by editing the lead and clicking on the **Add to Company List** button.

Once the user clicks on the button, the system will direct the user to the appropriate **Edit Company** page.

When expanding the Contacts panel, the details on the Leads page will populate the first contact on the company.

1.4 Claiming Leads

When unclaimed leads are loaded into the system or imported, they will appear in the **Unclaimed** view of the **View Leads** page.



The sales staff would then only need to click on the **Claim** link next to the leads' name.
There will be pop-up a message confirming that the lead was successfully claimed.