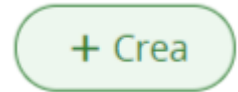


3.1.1 Lead creation

Creating a new lead: to create a new record, access the LEADS module and click on the button



	Action	Lead No.	Last Name ▼	First Name	Company	Phone	Website	Assigned To
<input type="checkbox"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>		LEA26	CORIONAL	BRUNE	De BRUNE CORONIAL s.n.c.	3395068235		formazione.vtenext@gmail.com (Francesco ...)
<input checked="" type="checkbox"/>		LEA15	COSSTRAVEL	ALDE	Walback - COSSTRAVEL S.p.A.	3463562373		formazione.vtenext@gmail.com (Francesco ...)
<input checked="" type="checkbox"/>		LEA6	Davis	Jennifer	Vtecm	(861) 252-2877	www.demonte.com	formazione.vtenext@gmail.com (Francesco ...)
<input checked="" type="checkbox"/>		LEA17	DONATELLES	BATTISTE	EffeEsse donatelles s.a.s.	292109719		formazione.vtenext@gmail.com (Francesco ...)
<input checked="" type="checkbox"/>		LEA18	FANTASIA	MARIA	Polgritte S.p.A.	3385473549		formazione.vtenext@gmail.com (Francesco ...)
<input checked="" type="checkbox"/>		LEA24	GLEARMIN	ADRIAN	Pinnura s.r.l.	329248368		formazione.vtenext@gmail.com (Francesco ...)
<input checked="" type="checkbox"/>		LEA14	GNATABEL	GUIDE	GNATABEL - PolmoRE s.n.c.	445362391		formazione.vtenext@gmail.com (Francesco ...)
<input checked="" type="checkbox"/>		LEA2	Johnson	Patricia	T3m invest/a/s	(961) 827-7432	www.t3minvesta/s.com	formazione.vtenext@gmail.com (Francesco ...)
<input checked="" type="checkbox"/>		LEA4	Jones	Barbara	Vtecinc	(968) 611-2019	www.vtecinc.com	formazione.vtenext@gmail.com (Francesco ...)
<input checked="" type="checkbox"/>		LEA12	LOMANITIRE	CARL COSINE	Lomanitire - Trevesas S.p.A.	(833) 9140402		formazione.vtenext@gmail.com (Francesco ...)
<input checked="" type="checkbox"/>		LEA20	MARLIZZURCK	PAUL	Marlizzurck - Eravase S.p.A.	(308) 91750154		formazione.vtenext@gmail.com (Francesco ...)
<input checked="" type="checkbox"/>		LEA7	Miller	Maria	T3m invest/a/s	(269) 048-3382	www.usable-vtc.com	formazione.vtenext@gmail.com (Francesco ...)
<input checked="" type="checkbox"/>		LEA9	Moore	Margaret	Vtecinc	(757) 175-2221	www.vtouser.com	formazione.vtenext@gmail.com (Francesco ...)

The lead creation window will appear:

Search...

🔍 ⌂ 📧 📅 ⚙️ ⭐ 📄 👤

Creating Lead

Save

Cancel

INFORMATIONSTEST

Lead Information

Lead No

AUTO GEN ON SAVE

Phone

Mobile

Fax

Email

Industry

Actual Revenue (K)

Rating

Assigned To

User

snicklopolozhwing@pprrv.com (Alberto Cavalieri)

Last Name

Company

Title

Lead Source

First Name

Website

http://

Lead Status

No of employees

Street

Postal Code

Country

Address Information

PO Box

City

State

Example of key record fields:

Name/Surname	Name and surname of the contact person.
Company	Company name in which person is employed or that he/she represents.
Title	Role of the contact person (Proprietor, Sales Manager, CEO).
Lead source	Channel through which the lead was obtained.
Assigned to	User or group of users assigned to the lead management; the new lead is first assigned to the user who created it, but a different user can be chosen if required.

The fields highlighted in light blue are required. The CRM admin user can change the obligatory attributes (except for some fundamental fields such as Surname), create new fields, change drop-down menu values (such as Lead Source) and more besides. For more on this topic refer to chapter 16.7 concerning the Layout Editor.

Once the lead has been saved and the detail view opened, you can start managing the related marketing activities:

- emails sent or linked to the lead file;
- calendar activities (events and/or to-dos);
- newsletter campaigns (the lead will be part of the target involved in the campaign) or telemarketing campaigns (saleable separately);
- documents.

ANONYMIZE: in the new release, clicking on the “Other” button provides access to the “Anonymize” option. This feature has been created to manage leads according to GDPR rules. Anonymized Leads and Contacts cannot be restored.

Revision #1

Created 23 August 2023 07:23:55 by Thomas

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