Lead Statuses

Last Modified on 01/23/2019 3:06 pm EST

Overview

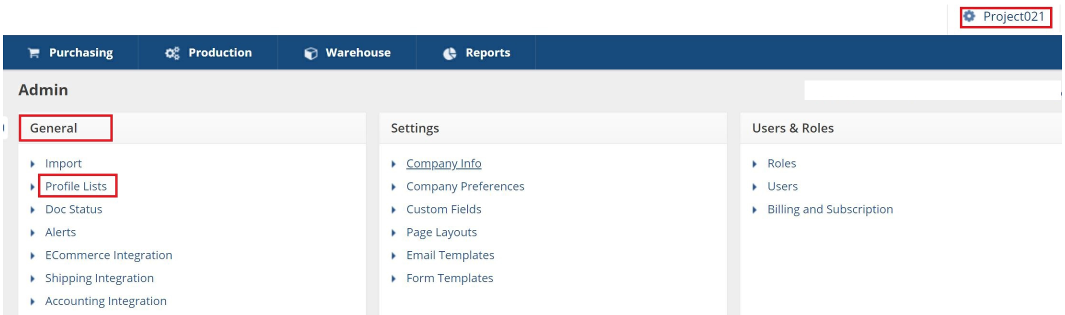
The Lead Statuses Profile List is used to set up different statuses that can be assigned to leads in the system. These can be used to trace where in the pipeline the lead currently is (i.e. which are your new leads, which need follow ups, etc.).

Adding Lead Statuses

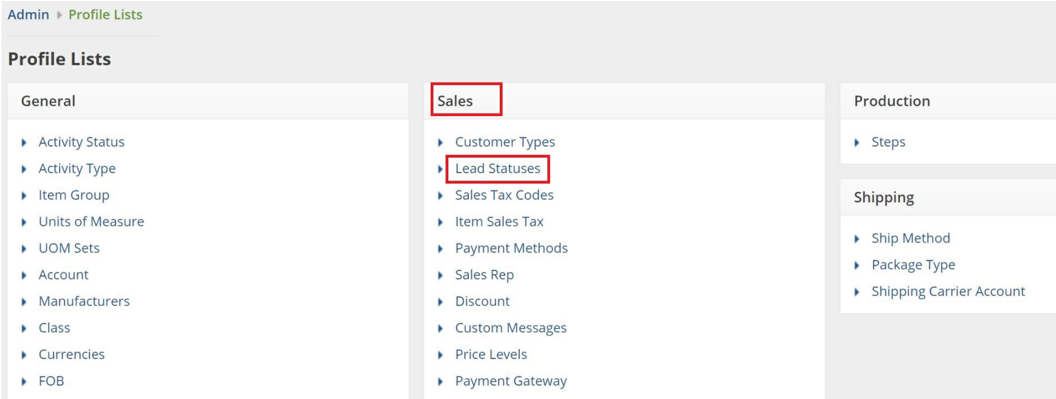
It is useful to classify and filter the leads to keep them organized. The default lead status will be assigned to all leads being newly created *unless* they are changed manually by the user.

To access the Lead Statuses setting:

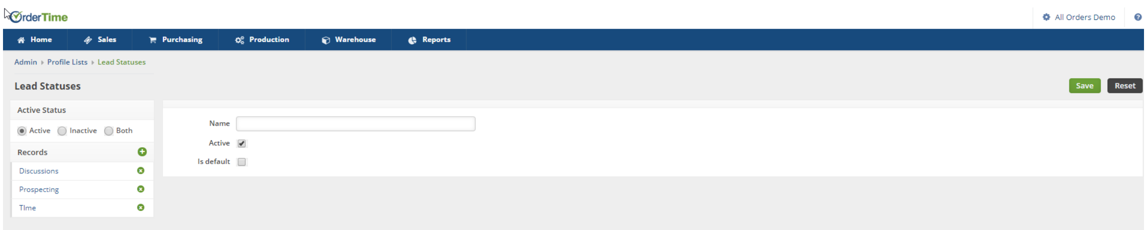
1. Click the ***Gear*** icon on the top right of the screen.
2. Under ***General*** category, click **Profile List**.



3. Under the ***Sale*** category, click **Lead Statuses**.



4. Enter the Lead Statuses *Name.* Check the boxes to indicate that the Lead Status is *Active* and/or if the Lead Status is *Default* (if applicable).
5. Click **Save**.



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