Lead Statuses

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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**.

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Admin		
General	Settings	Users & Roles
Import	<u>Company Info</u>	 Roles
Profile Lists	Company Preferences	 Users
 Doc Status 	Custom Fields	 Billing and Subscription
 Alerts 	Page Layouts	
ECommerce Integration	Email Templates	
 Shipping Integration 	Form Templates	
 Accounting Integration 		

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

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General	Sales	Production
Activity Status	Customer Types	► Steps
 Activity Type 	Lead Statuses	
Item Group	Sales Tax Codes	Shipping
 Units of Measure 	Item Sales Tax	
 UOM Sets 	 Payment Methods 	Ship Method
 Account 	 Sales Rep 	Package Type
 Manufacturers 	 Discount 	Shipping Carrier Account
Class	 Custom Messages 	
Currencies	 Price Levels 	
▶ FOB	Payment Gateway	

- 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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More about Customer Management with Order Time