Guide n°
UK3

Handy **guides**

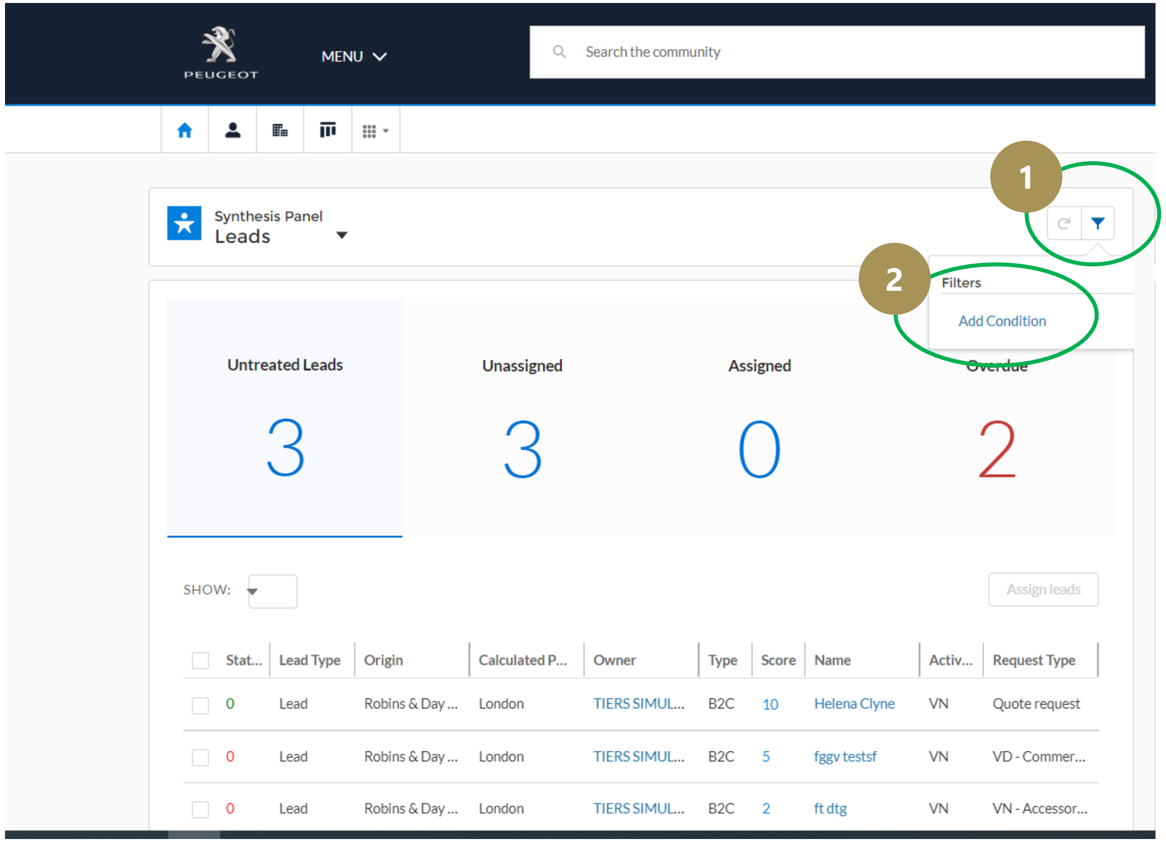
Reviewing Leads in Customer FIRST

Filtering and views

Understanding lead statuses and different lead views

Understanding and filtering in the Lead synthesis table

- Leads which show in the lead synthesis table are all in ‘NEW’ status which means they have not been updated to say that contact has been attempted, the lead has been discarded or the lead has been qualified.
- Leads will stay in this view until the lead has been updated to show that one of these actions has been taken.
- As mentioned in guide ‘UK02_BDC_Lead_Overview’, all users with the roles of Sales Manager, Aftersales Manager and BDC users have visibility of ALL sales and aftersales leads, so how do you filter what you need to see in this view…?



1 Select the filter icon

2 Select ‘add condition’

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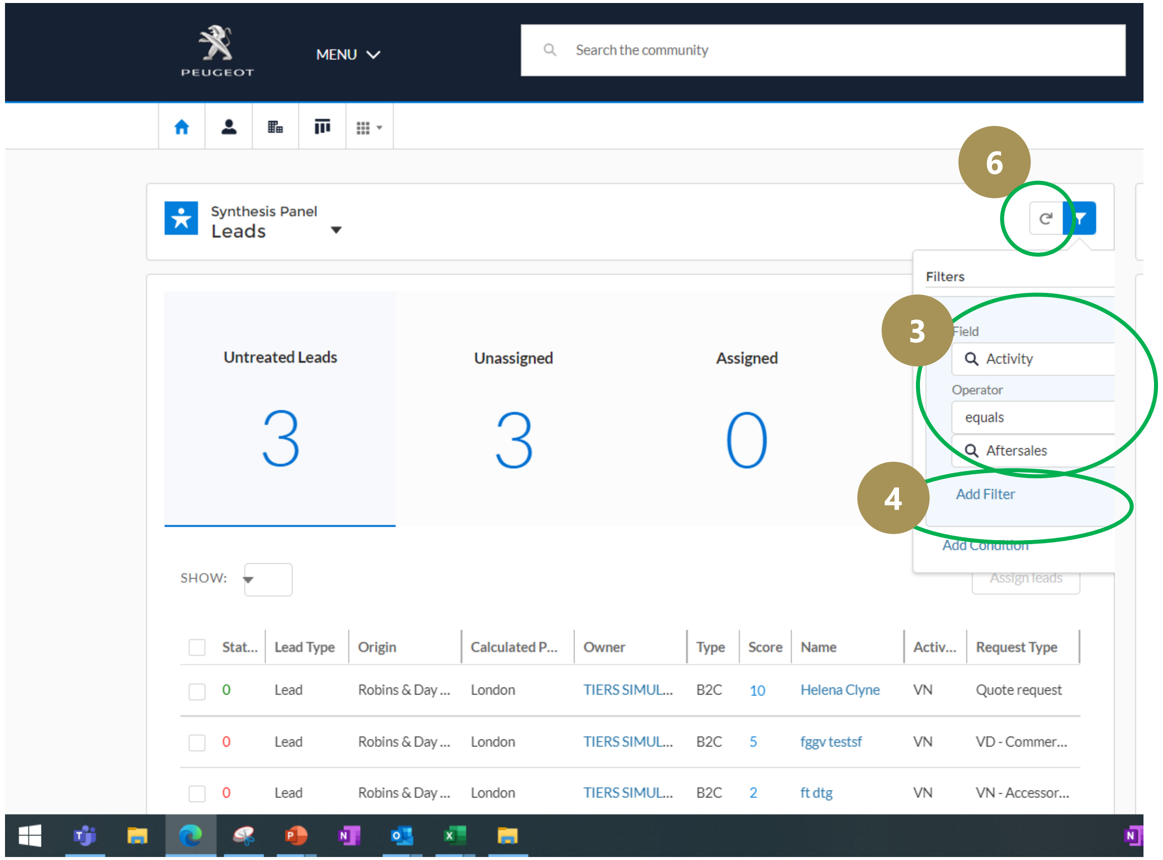
Understanding and filtering in the Lead synthesis table (cont…)



3 Select the filter parameters:

- The field you want to filter on
- The filter you want to perform
- The value you want to filter on

e.g. Activity equals Aftersales to see only Aftersales leads

4 Click ‘Add filter’

5 Repeat this to add as many filters as needed

6 Select ‘refresh’ to see the results of your filter

When the filter button is blue  a filter is ON

When the filter button is white  there is NO filter on

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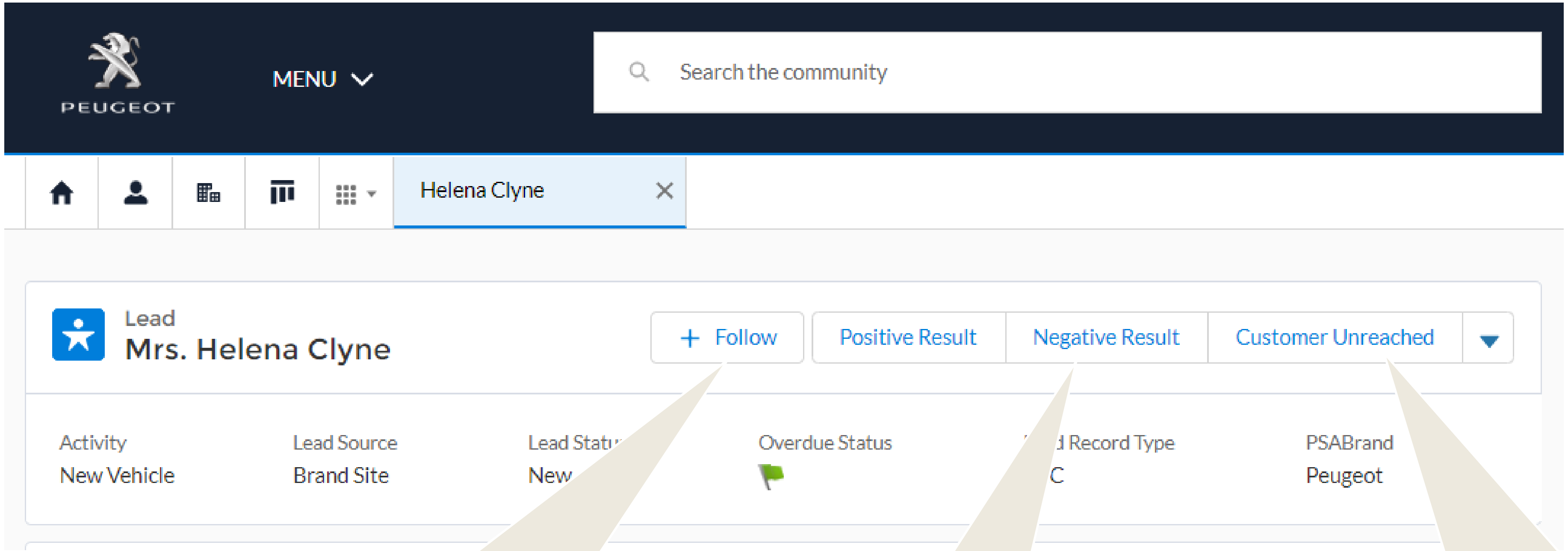
Understanding lead statuses



Recording a **positive result** changes the lead status to **'Qualified'.**
This means that there is a qualified business opportunity which needs to be managed through the sales process

Recording a **negative result** changes the lead status to either:
- **Invalid Details**
- **No Opportunity**

Depending on the option selected when logging this response.
This means there is no opportunity and the lead will either be discarded or closed to be 'nurtured' at later date

Recording a lead as **Customer Unreached** will change the lead status to **'Contact Attempted'**
This means that an attempt has been made and a reminder task has been set

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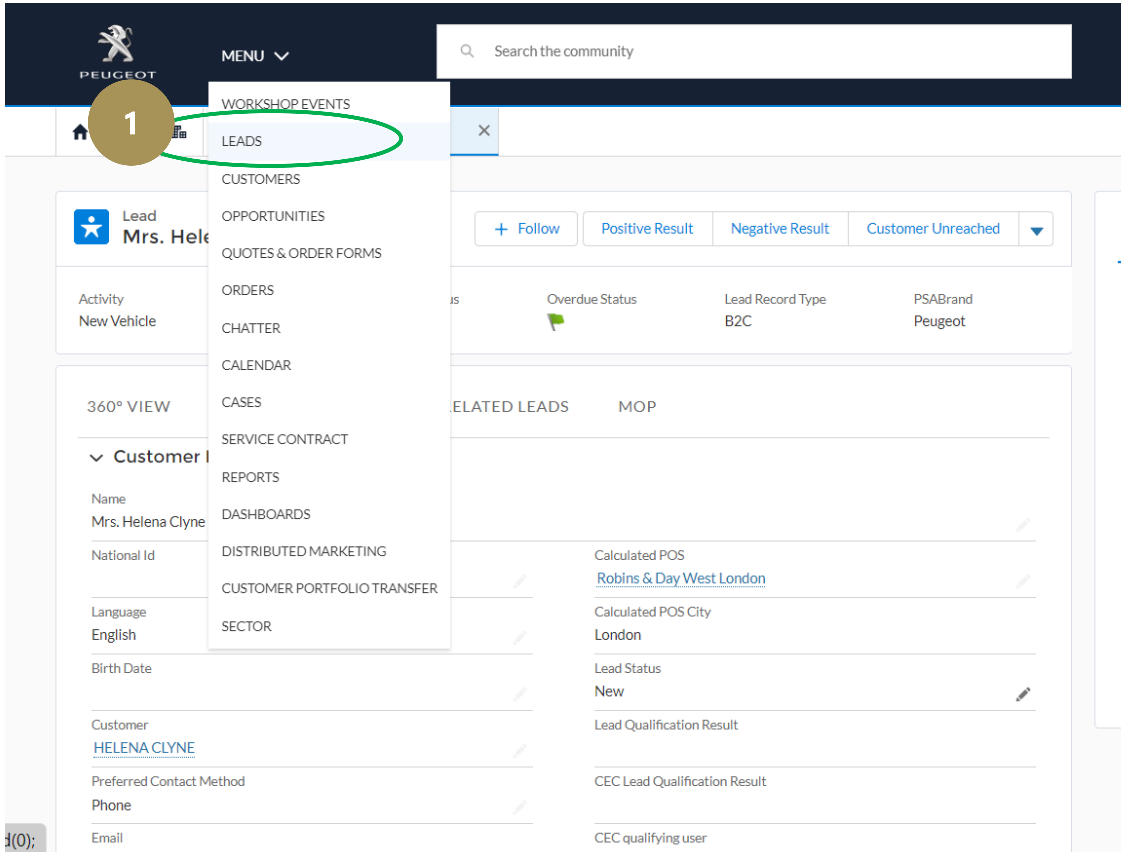
Reviewing leads after they have been managed…

- Once you have treated a lead and recorded a result (positive, negative or customer unreached) it will 'disappear' from the Lead Synthesis table so how can I view them?



1 You can access the full lead list view from the Main Menu

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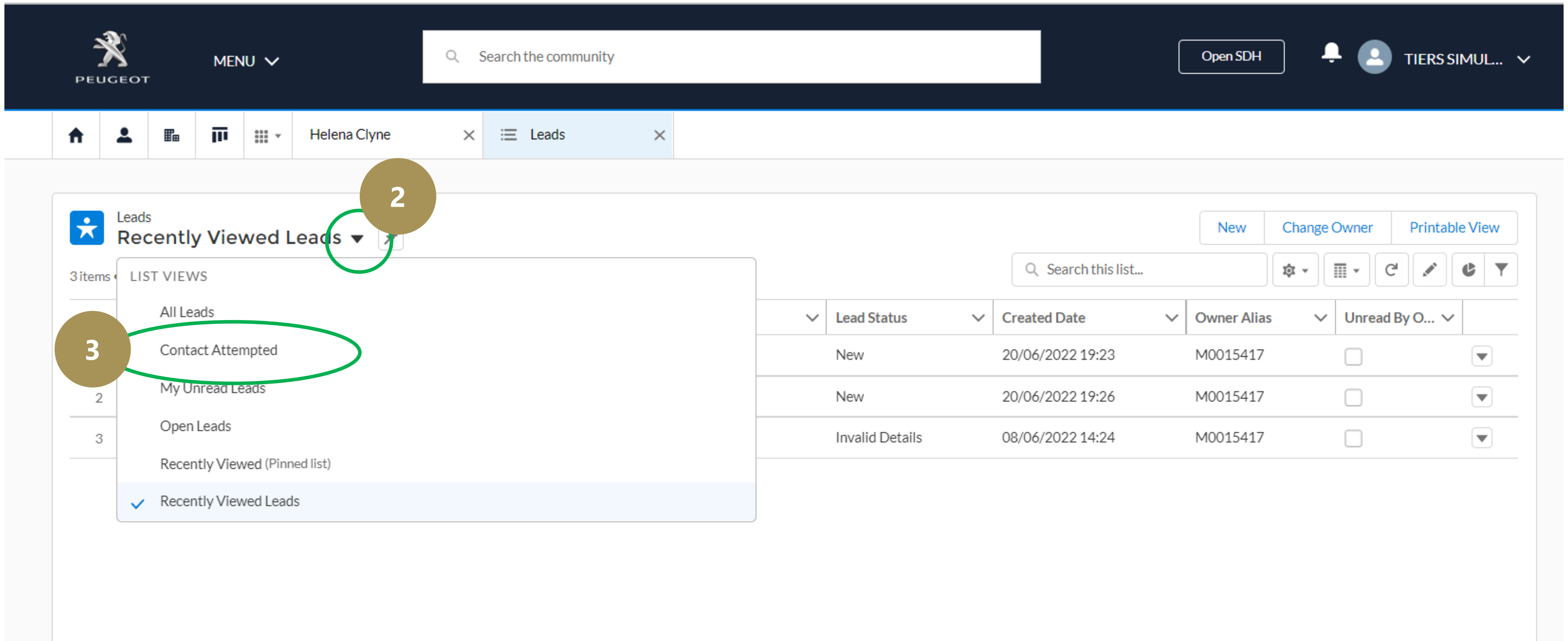
Reviewing leads after they have been managed (cont…)



2 The view will show 'recently viewed' lead by default but you can select other views using the drop down

3 Leads which you recorded as 'Customer Unreached' will show in the 'contact attempted' list view.
The call back reminder task which you set during the action to record the attempted contact will also show in your calendar on the selected due date

NOTE: *Qualified Leads will not show in this view because they have been converted into* ***opportunities****. You can see them by returning to the lead synthesis view and using the drop down to switch to the Opportunity synthesis view. To understand the difference between a lead and opportunity, please see handy guide '12_HG_Difference Lead Opportunity'*

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