



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...?

PEUGEOT MENU Search the community

Synthesis Panel Leads

Untreated Leads: 3, Unassigned: 3, Assigned: 0, Overdue: 2

SHOW: [dropdown] Assign leads

<input type="checkbox"/>	Stat...	Lead Type	Origin	Calculated P...	Owner	Type	Score	Name	Activ...	Request Type
<input type="checkbox"/>	0	Lead	Robins & Day ...	London	TIERS SIMUL...	B2C	10	Helena Clyne	VN	Quote request
<input type="checkbox"/>	0	Lead	Robins & Day ...	London	TIERS SIMUL...	B2C	5	fggv testsf	VN	VD - Commer...
<input type="checkbox"/>	0	Lead	Robins & Day ...	London	TIERS SIMUL...	B2C	2	ft dtg	VN	VN - Accessor...

- 1 Select the filter icon
- 2 Select 'add condition'

Reviewing Leads in Customer FIRST

Filtering and views


Understanding lead statuses and different lead views

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

The screenshot shows the Peugeot Synthesis Panel Leads interface. At the top, there is a search bar and a menu. Below, there are three summary cards: 'Untreated Leads' (3), 'Unassigned' (3), and 'Assigned' (0). A table below shows lead details with columns for Status, Lead Type, Origin, Calculated P..., Owner, Type, Score, Name, Activ..., and Request Type. A 'Filters' dropdown menu is open, showing options for Field (Activity, Aftersales), Operator (equals), and an 'Add Filter' button. Numbered callouts indicate: 3 points to the filter configuration options; 4 points to the 'Add Filter' button; 5 points to the 'Add Condition' button; and 6 points to the filter refresh button (a blue square with a white triangle pointing down).

- 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

Understanding lead statuses

PEUGEOT MENU

Search the community

Helena Clyne

Lead Mrs. Helena Clyne

+ Follow Positive Result Negative Result Customer Unreached

Activity	Lead Source	Lead Status	Overdue Status	Record Type	PSABrand
New Vehicle	Brand Site	New		C	Peugeot

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

Reviewing leads after they have been managed...

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

The screenshot shows the Peugeot CRM interface. At the top, there is a dark blue header with the Peugeot logo, a 'MENU' dropdown, and a search bar labeled 'Search the community'. Below the header, a main menu is visible on the left side. A red circle with the number '1' highlights the 'LEADS' option in the menu. The background shows a lead record for 'Mrs. Helena Clyne' with various fields and a '360° VIEW' section.

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

Reviewing leads after they have been managed (cont...)

The screenshot shows the Peugeot CRM interface. At the top, there is a search bar and user information. Below, the 'Leads' section is active. A dropdown menu for 'Recently Viewed Leads' is open, showing options: 'All Leads', 'Contact Attempted', 'My Unread Leads', 'Open Leads', 'Recently Viewed (Pinned list)', and 'Recently Viewed Leads'. The 'Contact Attempted' option is circled in green and labeled with a '3'. The 'Recently Viewed Leads' option is highlighted in blue and labeled with a '2'. To the right, a table displays lead data:

Lead Status	Created Date	Owner Alias	Unread By O...
New	20/06/2022 19:23	M0015417	<input type="checkbox"/>
New	20/06/2022 19:26	M0015417	<input type="checkbox"/>
Invalid Details	08/06/2022 14:24	M0015417	<input type="checkbox"/>

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'