



Reviewing leads after they have been managed – Creating List views

As we saw in Handy Guide UK03 you only see leads which are in 'NEW' status in the Lead Synthesis table (which is where you land when you log-in)

The screenshot shows the 'Synthesis Panel Leads' dashboard. At the top, there's a search bar and a user profile. Below, a summary card displays four categories: Untreated Leads (6), Unassigned (6), Assigned (0), and Overdue (0). A table below shows a list of leads with columns for Status, Lead Type, Origin, Calculated P..., Owner, Type, Score, Name, Activ..., and Request Type. A 'Calendar and Tasks' sidebar is visible on the right.

This screenshot shows the main menu with 'LEADS' highlighted in a green circle. A '1' in a brown circle points to the menu. Below the menu, a lead record for 'Mrs. Helena Clyne' is shown with details like 'New Vehicle', 'Overdue Status', 'Lead Record Type B2C', and 'PSABrand Peugeot'. The '360° VIEW' section is also visible.

1 If you want to view leads which have been managed and need follow up, you can do this in the 'Lead' screen which is accessed via the main menu.

Lead List Views Creating your own list filters

How to create list views in the Lead object

2 The view will show 'recently viewed' lead by default

3 Other standard views are available in the drop down. Selecting them will automatically display the relevant leads in the list view. For example, Leads which the team have 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*)

The screenshot shows the Peugeot CRM interface. At the top, there is a dark blue header with the Peugeot logo, a 'MENU' dropdown, a search bar for the community, and user information for 'TIERS SIMUL...'. Below the header, a navigation bar shows 'Helena Clyne' and 'Leads'. The main content area features a 'Leads' view with a dropdown menu open. The dropdown menu lists several view options: 'All Leads', 'Contact Attempted', 'My Unread Leads', 'Open Leads', 'Recently Viewed (Pinned list)', and 'Recently Viewed Leads'. The 'Recently Viewed Leads' option is highlighted with a blue bar and a checkmark, and is circled in green with a '2' callout. The 'Contact Attempted' option has a '3' callout. The main table displays three lead entries:

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"/>



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'

- 4 To create a new list view to display leads to your own specification – first click on the settings icon.
- 5 Select 'New' from the menu.


The screenshot shows the Peugeot CRM interface. At the top, there is a dark blue header with the Peugeot logo, a 'MENU' dropdown, a search bar 'Search the community', and buttons for 'Open SDH', a notification bell, and a user profile 'TIERS SIMUL...'. Below the header, there are tabs for 'Helena Clyne' and 'Leads'. The main content area shows a 'Leads' list view titled 'Recently Viewed Leads'. A settings menu is open, showing options like 'Change Owner', 'Printable View', and 'LIST VIEW CONTROLS'. The 'LIST VIEW CONTROLS' menu is expanded, showing options like 'New', 'Clone', 'Rename', 'Sharing Settings', 'Show List Filters', 'Select Fields to Display', 'Delete', and 'Reset Column Widths'. The 'New' option is highlighted with a green circle and a '5' callout. The settings icon in the top right of the list view is also highlighted with a green circle and a '4' callout.


- 6 Give your view a name and ensure that 'only I can see this list view' is selected

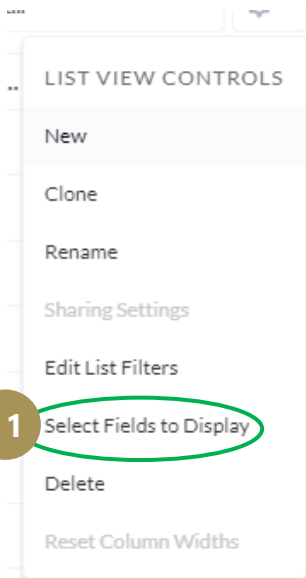
The screenshot shows the 'New List View' dialog box. It has a title bar 'New List View'. Below the title bar, there is a text input field for 'List Name' which is empty and highlighted with a red border and a green oval. Below the input field, there is a radio button selection for 'Who sees this list view?'. The 'Only I can see this list view' option is selected and highlighted with a green oval. Other options include 'All users can see this list view' and 'Share list view with groups of users'. At the bottom right, there are 'Cancel' and 'Save' buttons.

7 The 'filter' box will pop up on the right and you can select 'add filter' and add all the parameters you want to filter by.

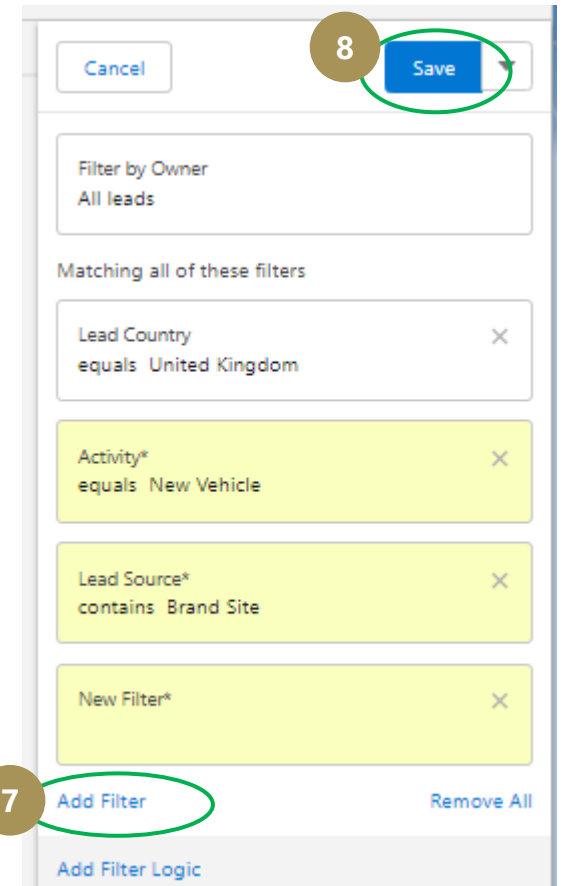
8 Select 'Save'.

9 Your filtered lead list will be displayed and you can make it the default view by clicking the 

10 If you want to add/remove columns to your new list view, select the settings button again 



11 Click on 'Select Fields to Display'



- 12 Use the arrows to move the fields you want from the 'available' fields on the left to the 'Visible' fields on the right to create the view you want.
- 13 Click 'save' and your new view will be created

