Reviewing leads after they have been managed – Creating List views

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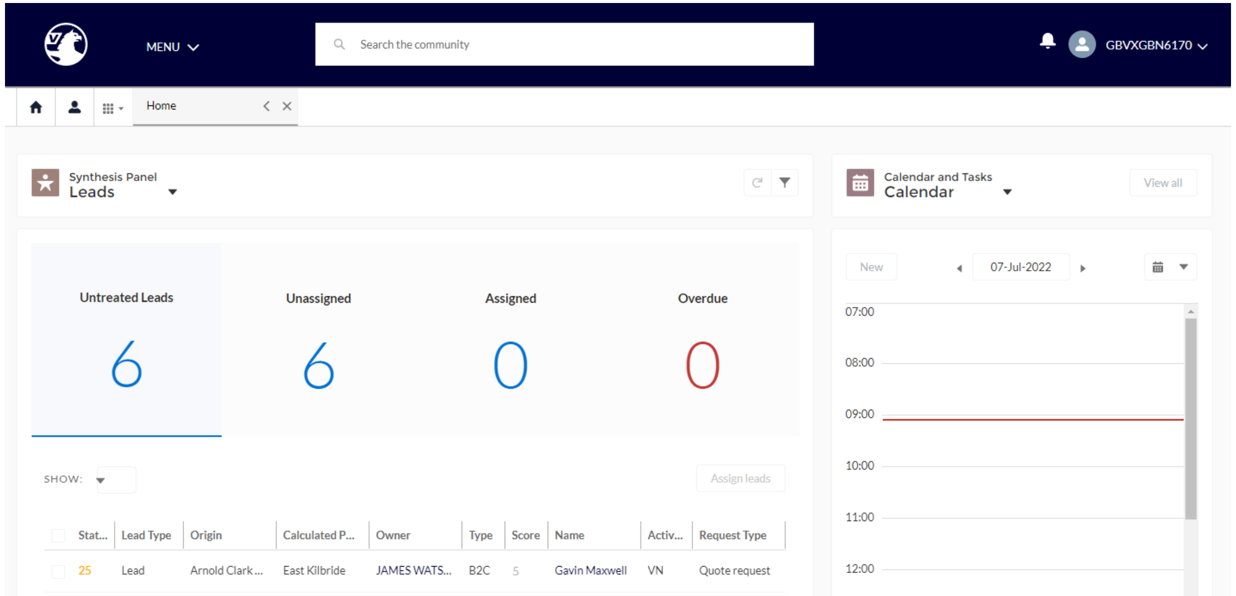
As we saw in Handy Guide UK03 you only see leads which are in ‘NEW’ status in the Lead Synthesis table (which is where you land when you log-in)

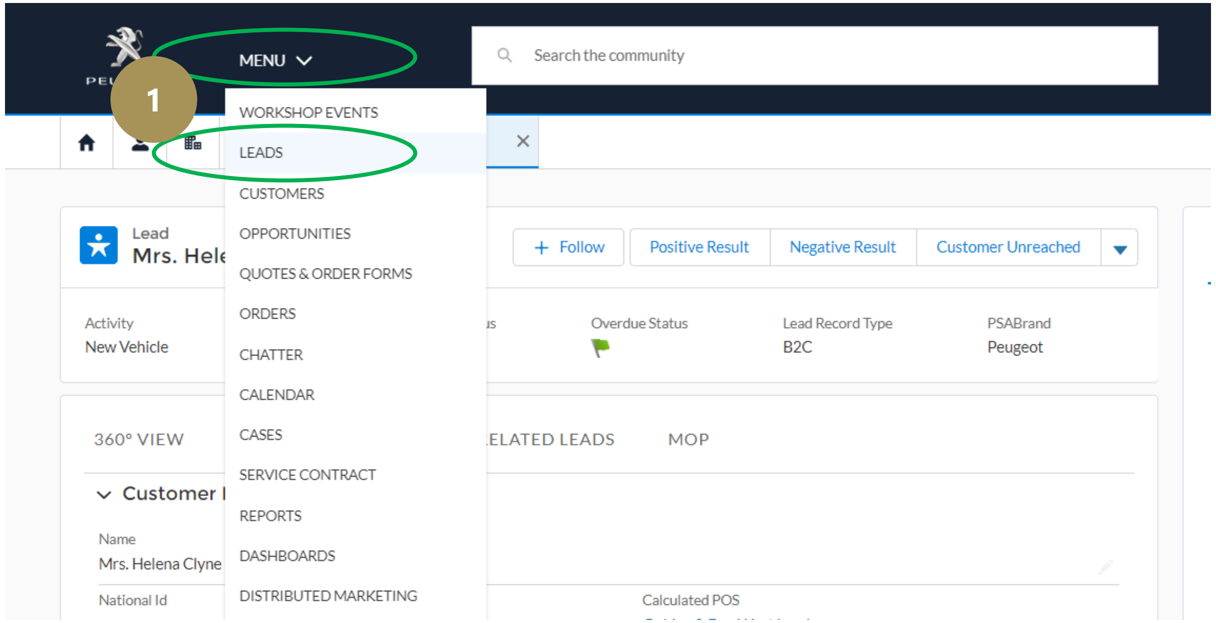


Lead List Views

Creating your own list filters

How to create list views in the Lead object

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.



Guide n°
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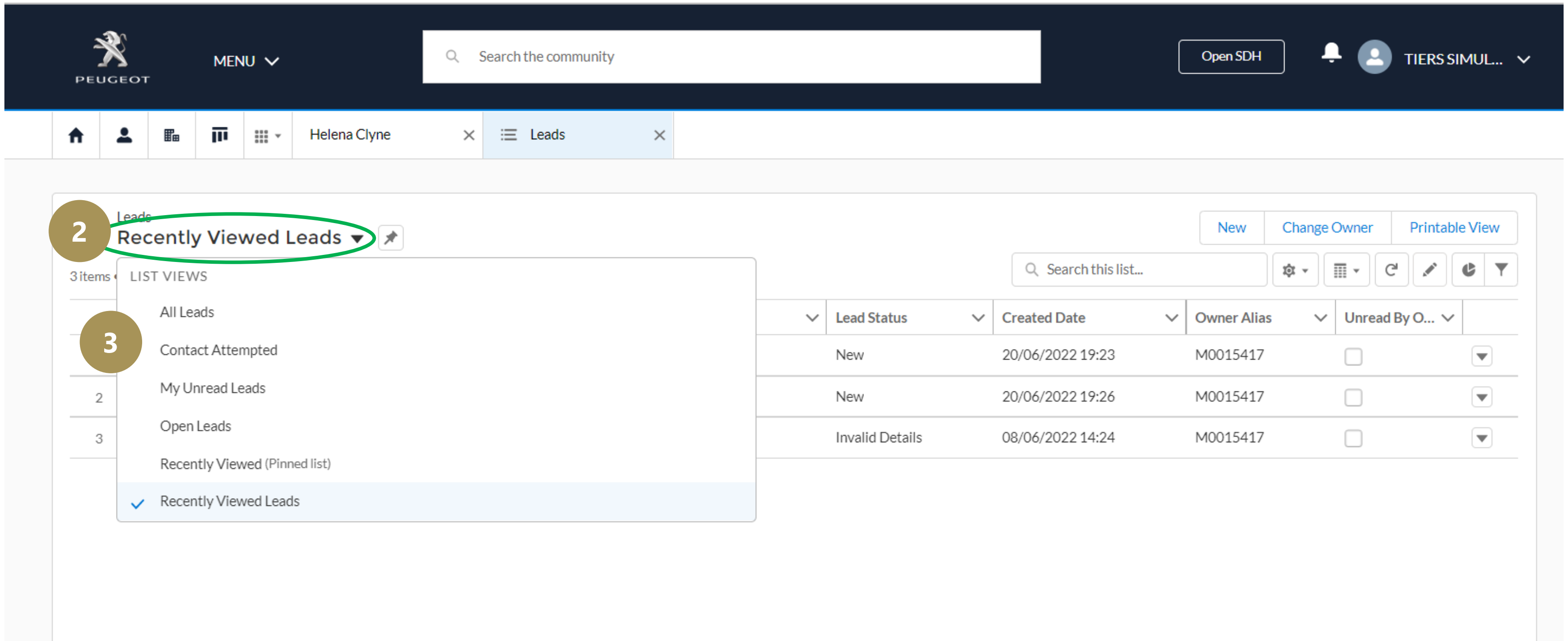
2 The view will show ‘recently viewed’ lead by default

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)*



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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’*

Guide n°
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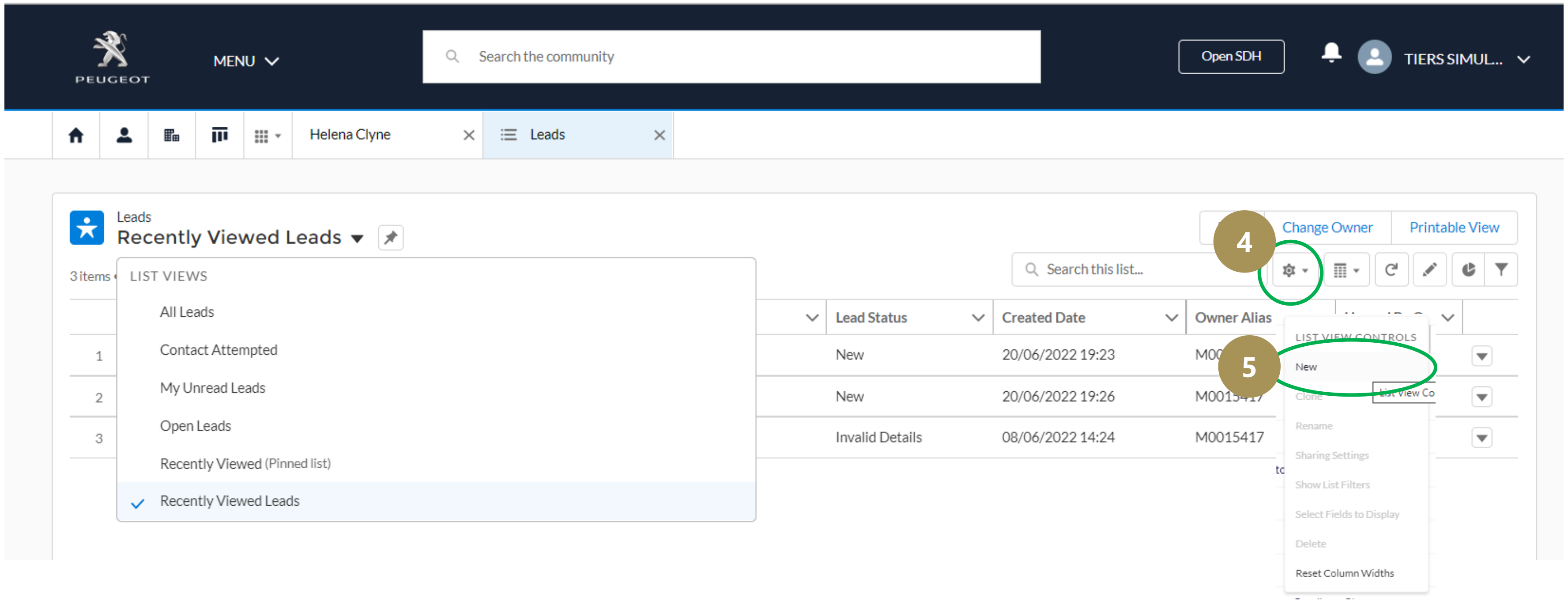
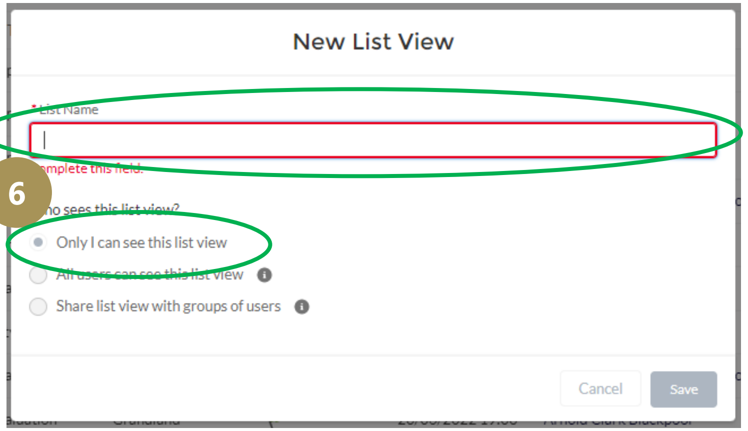
4 To create a new list view to display leads to your own specification – first click on the settings icon.

5 Select 'New' from the menu.



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



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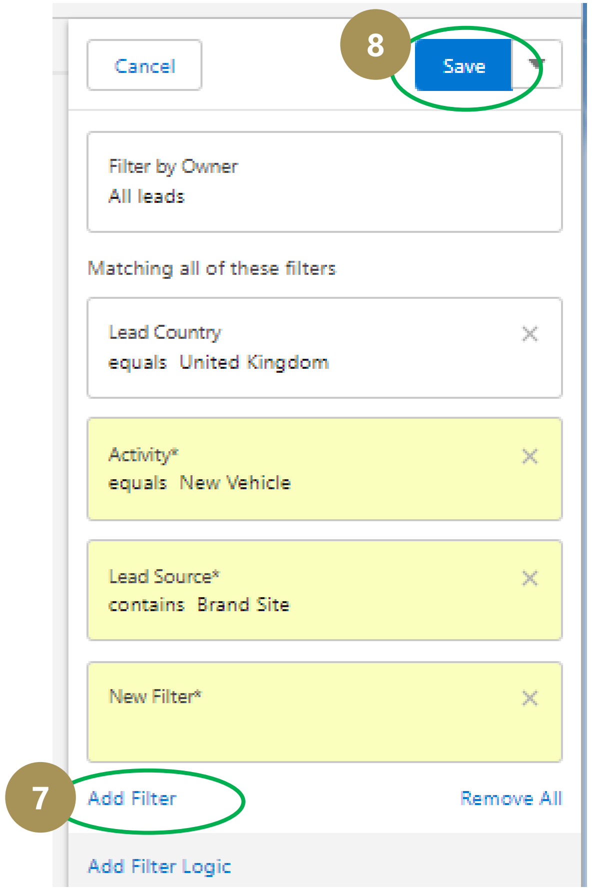
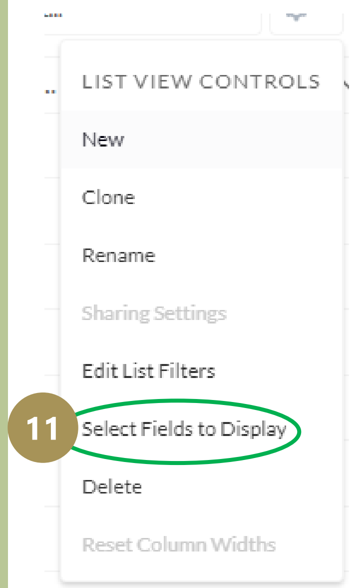
7 The ‘filter’ box will pop up on the right and you can select ‘add filter’ and add all the parameters you want to filter by.

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’

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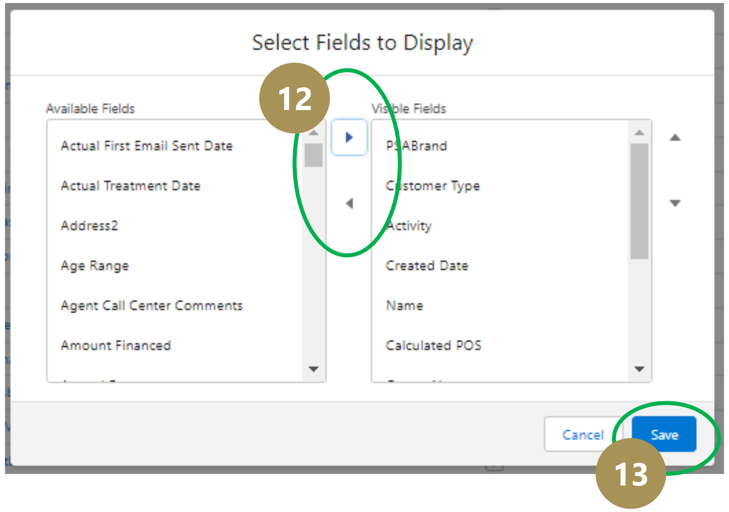
12 Use the arrows to move the fields you want from the 'available' fields on the left to the 'Visible' fields on the right to create the view you want.

13 Click 'save' and your new view will be created



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