Lead Management

User Guide

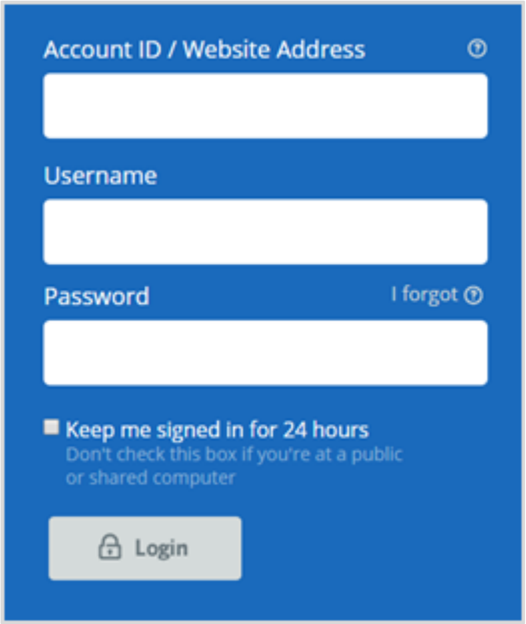
Learn more at StructuredWeb.com

Table of Contents

What you will find in this guide:

Login

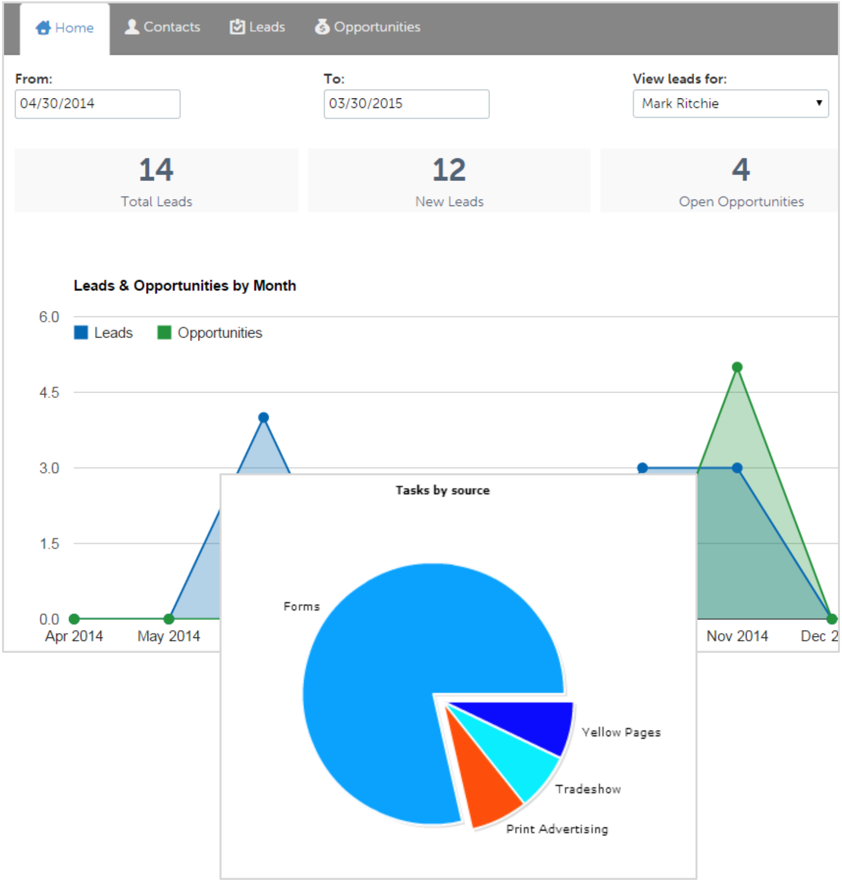
- Go to structuredweb.com and click **Login**.
- Enter your **Account ID, Username** and **Password.**



Note: If you forget your login information you can reset it by selecting the **I Forgot** link above the password field.

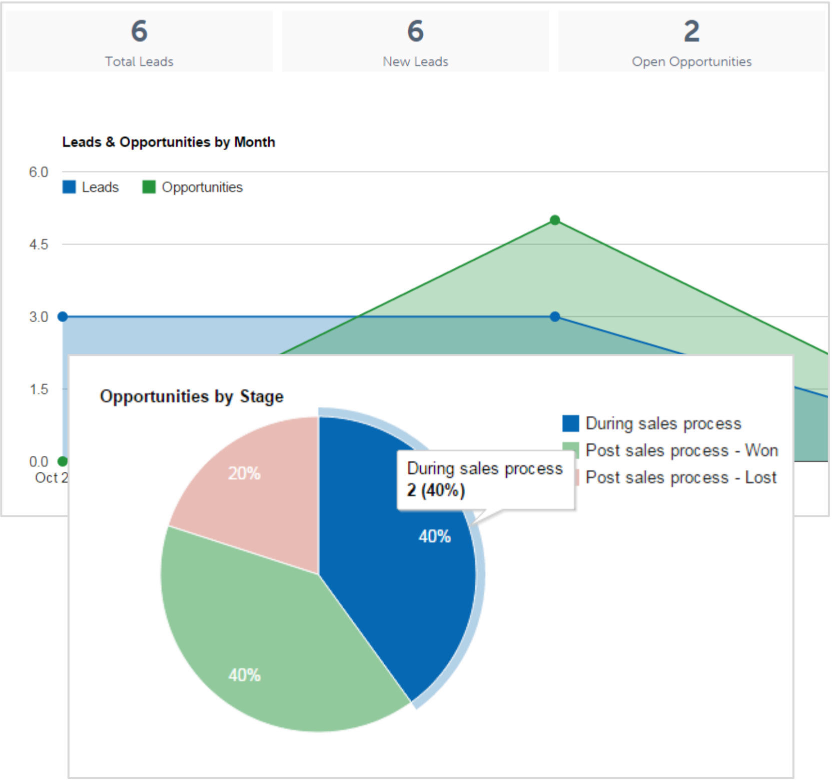
Getting There

- The Lead Portal captures all leads generated from campaigns such as emails, banner ads, SEM and more.
- Leads are broken down into stages based on the type of activity done within the campaign.
- They can be quickly qualified and moved into the appropriate stages until the lead is successful or fails.



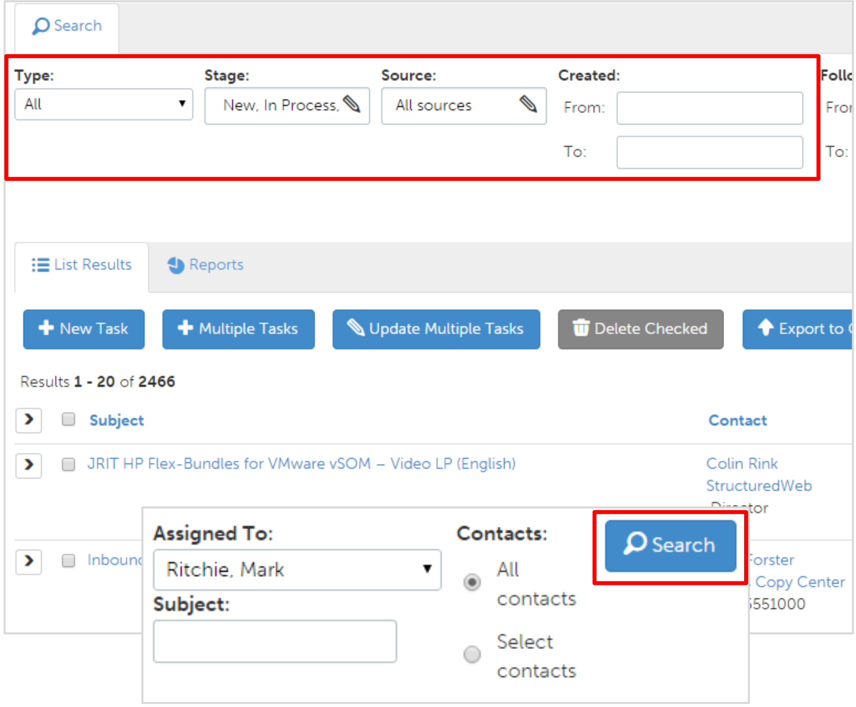
Getting There

- If you are not in Lead Management, select it from the drop down menu in the upper right corner.
- The first screen displayed is the dashboard. The dashboard displays total and new leads, open opportunities their dollar value.
- A graphical representation is displayed of leads & opportunities by month, leads by stage and opportunities by stage.



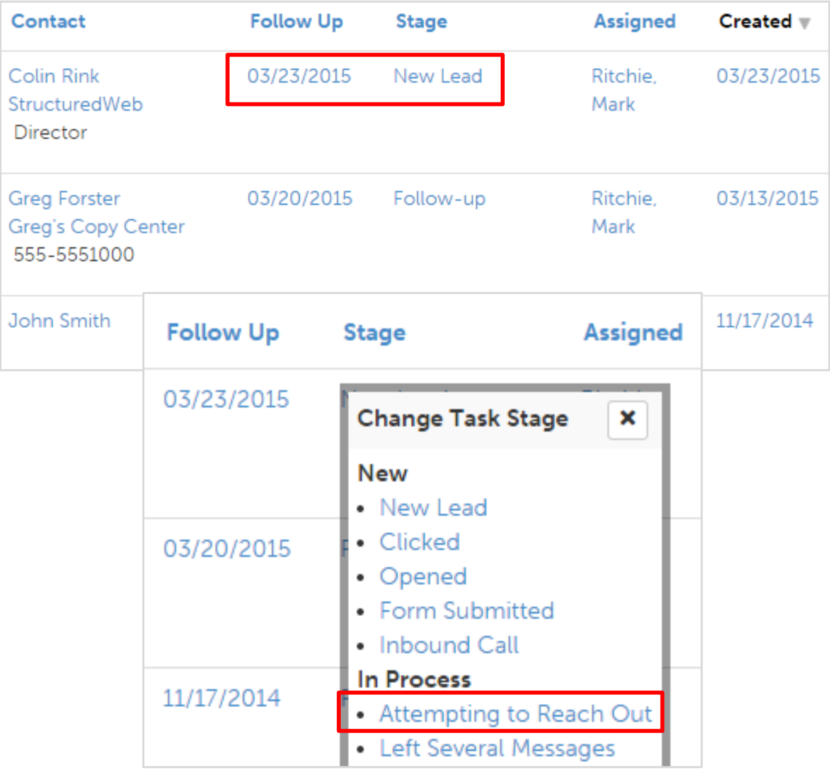
Accessing Leads

- To view and manage leads click the **Leads** tab located at the top of the page. This loads the Lead Portal.
- By default all leads are displayed. If needed use the search filters at the top of the page to narrow the results.
- After updating the filters, click **Search**. This refreshes the page and displays the matching results.



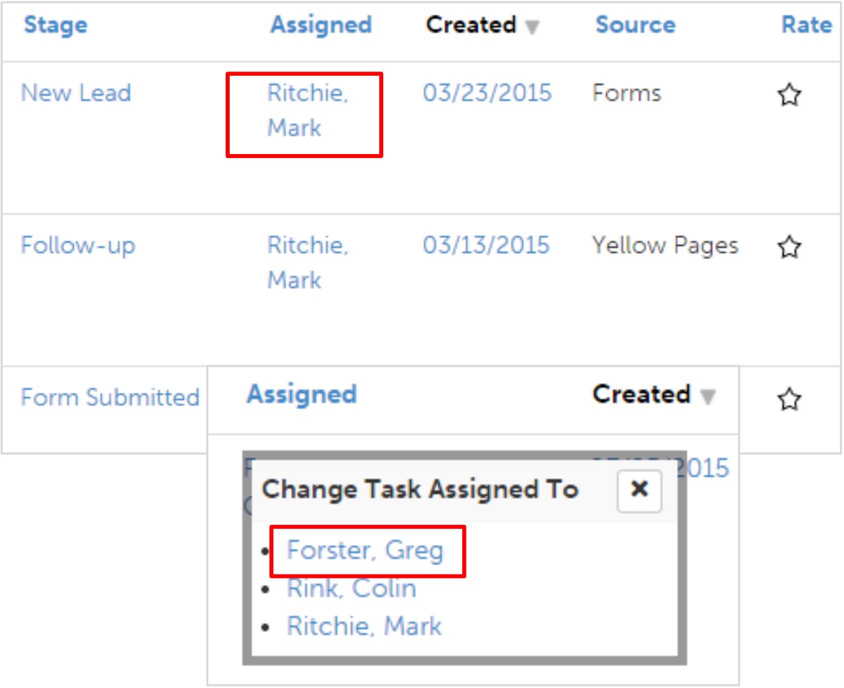
Managing Leads

- Leads can easily be managed directly from this page. They're broken into seven columns which can be sorted by clicking the column name
- The follow up date can be adjusted accordingly by clicking the **date** in the Follow Up column.
- Updating the Stage operates the same way. Click on the current **Stage Name** and move the lead into its appropriate stage. The stage should be updated periodically until the lead is successful or fails.



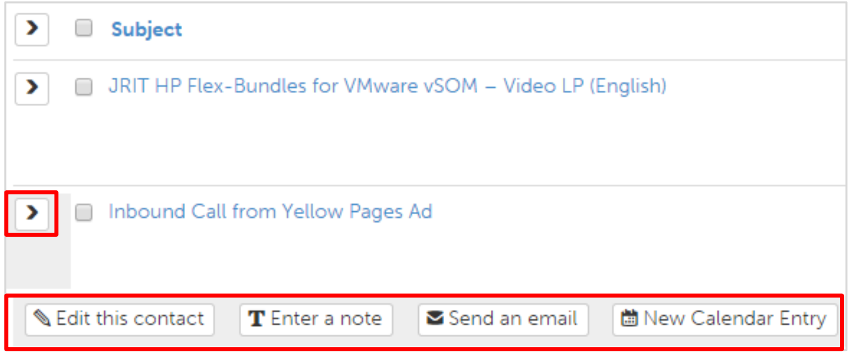
Managing Leads

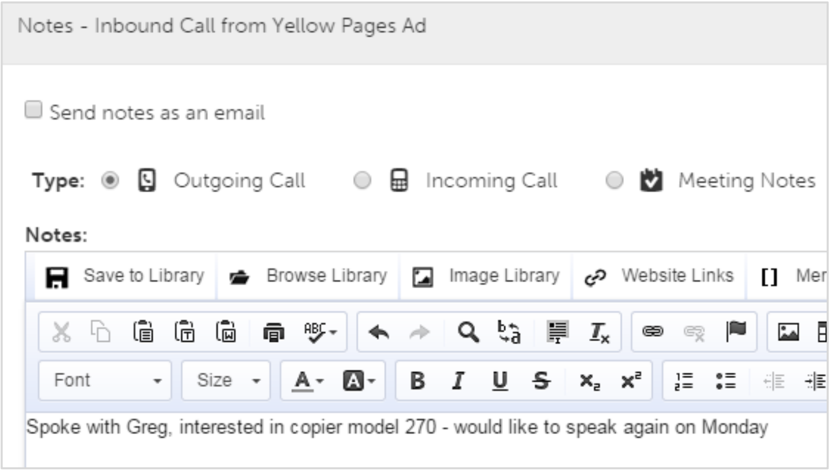
- If a lead needs to be managed by a different user, click the current **user's name** under the assigned column and choose the new user from the available list.
- The created column shows when the lead was created.
- The source column lists where the lead came from - a phone call, opened email, form submission, etc.



Managing Leads

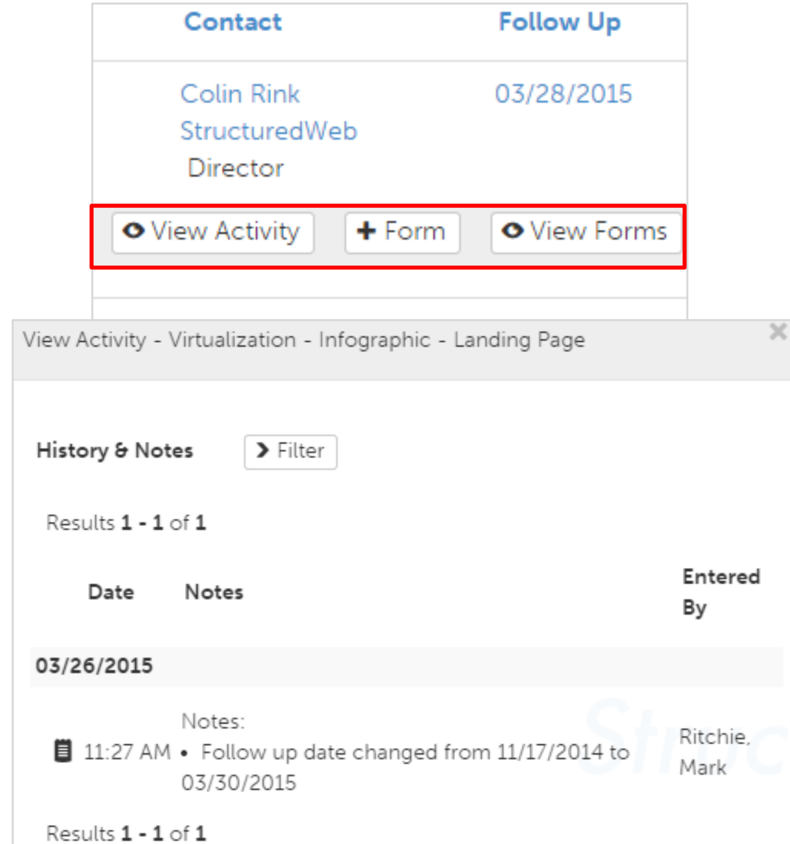
- Additional actions are available by clicking the arrow to the left of the lead.
- To update the contact information for the lead contact click **Edit this contact**.
- Conversations and activity on the lead can be recorded by clicking **Enter a note**.
- Emails can be sent to the contact directly from this page by clicking **Send an Email**.





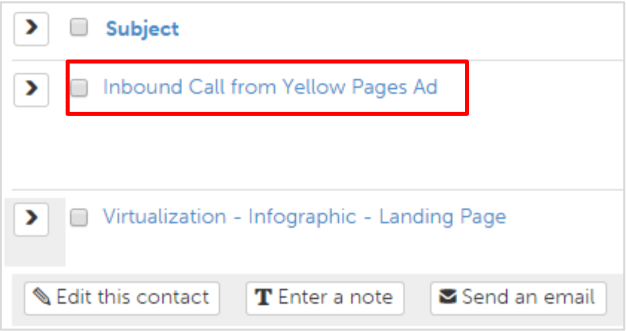
Managing Leads

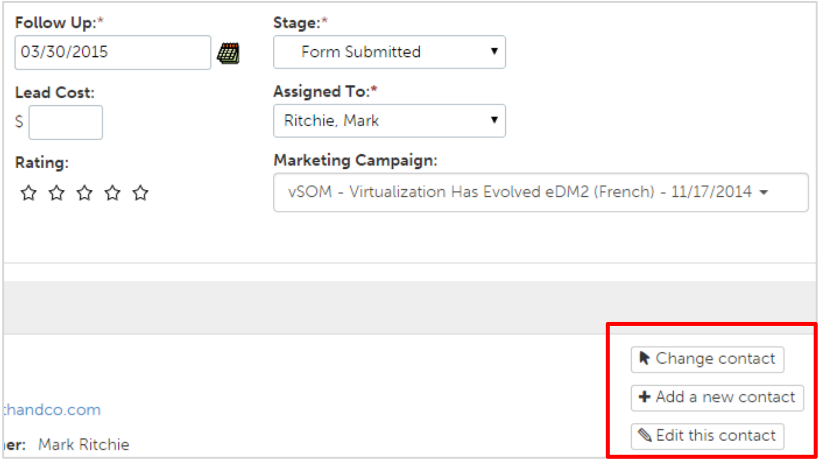
- To view all activity on the lead such as updated stages, new follow up dates or added notes, click **View Activity**.
- If specific qualifying information is required, click **+ Form** to select the proper form that needs to be filled out.
- **View Forms** displays previously submitted form data that corresponds to the lead.



Managing Leads

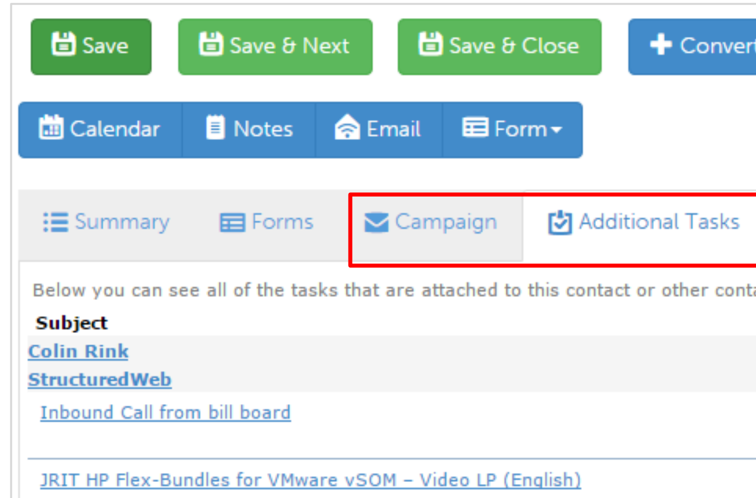
- For a more detailed overview of the lead, click the lead **subject**.
- The Lead Details page provides the same editing options as the list view, along with detailed information.
- To change the lead point of contact click **Change Contact** and search the database.
- If the new contact is not in StructuredWeb, click **Add a new contact** to create them.

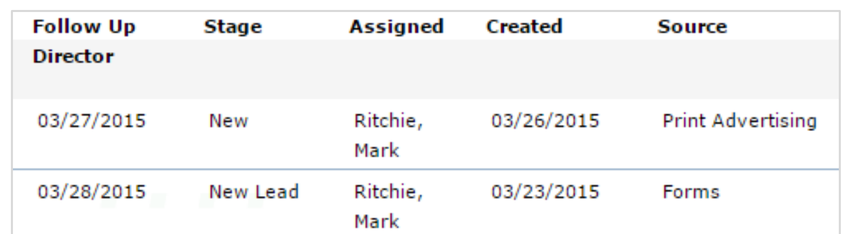




Managing Leads

- To review which campaign generated the lead click the **Campaign** tab.
- To view additional leads leads associated with click **Additional Tasks**.
- When finished making updates to this page, click **Save**.
- Click **Return to list** to be brought back to the Lead Portal.

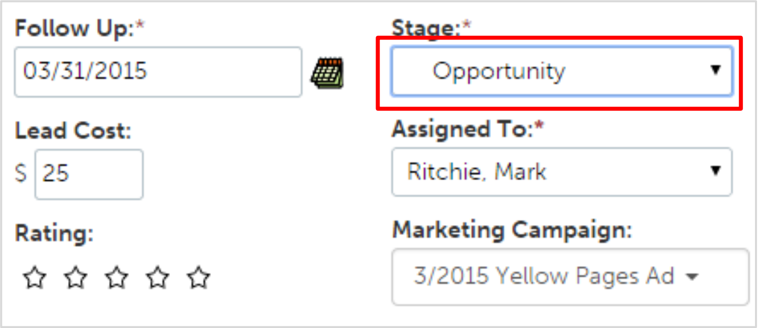


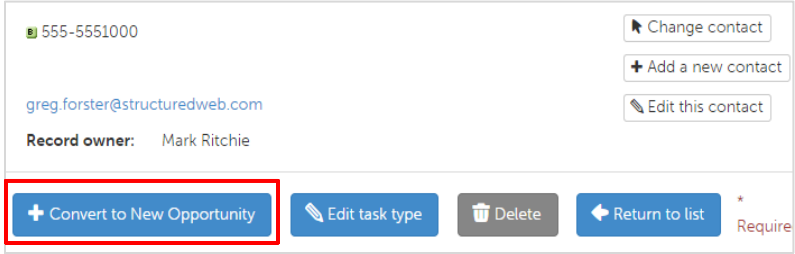


Follow Up Director	Stage	Assigned	Created	Source
03/27/2015	New	Ritchie, Mark	03/26/2015	Print Advertising
03/28/2015	New Lead	Ritchie, Mark	03/23/2015	Forms

Converting Leads to Opportunities

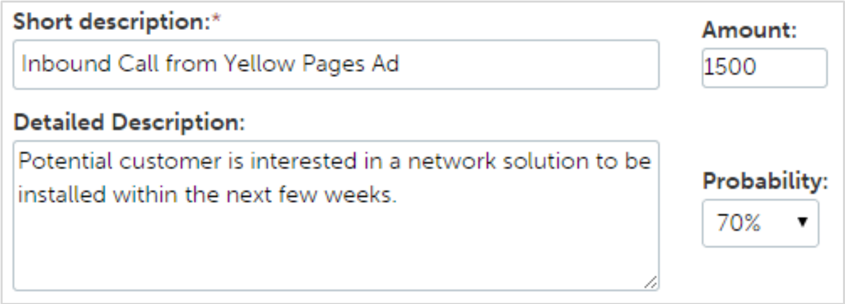
- When a lead has been qualified and has a high chance of becoming a sale it should be converted to an opportunity.
- From the Lead Portal click the **subject**. This loads the Lead Details page.
- To convert to opportunities leads should be moved to a success stage. Click the **Stage** drop down menu and select the appropriate success stage.
- When finished, click **Convert to New Opportunity**.

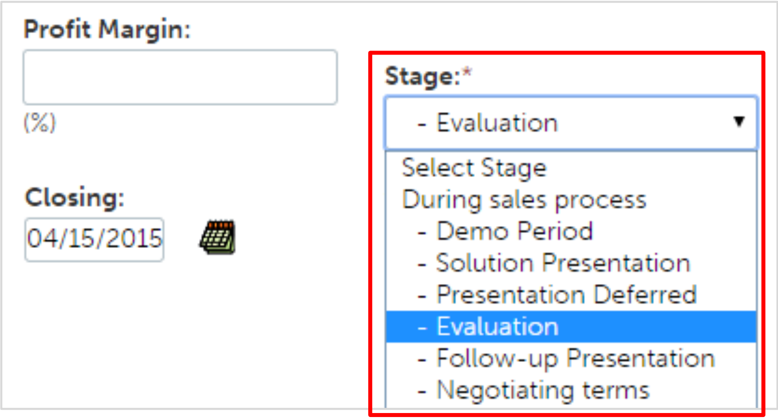




Converting Leads to Opportunities

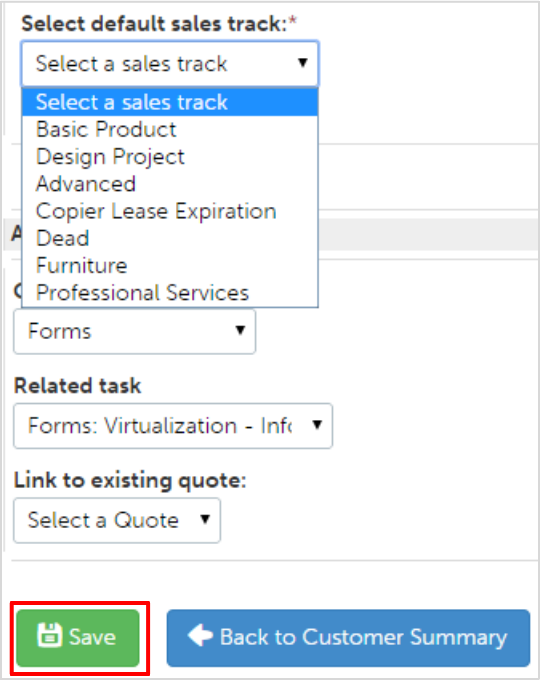
- This loads the opportunity details. Enter a **Detailed Description** of the opportunity.
- Enter the value **Amount** for the service/product they will be ordering.
- Estimate the **Probability** of closing and the date it should be closed by.
- Choose the opportunity **Stage** from the drop down, this functions the same way that lead stages work.





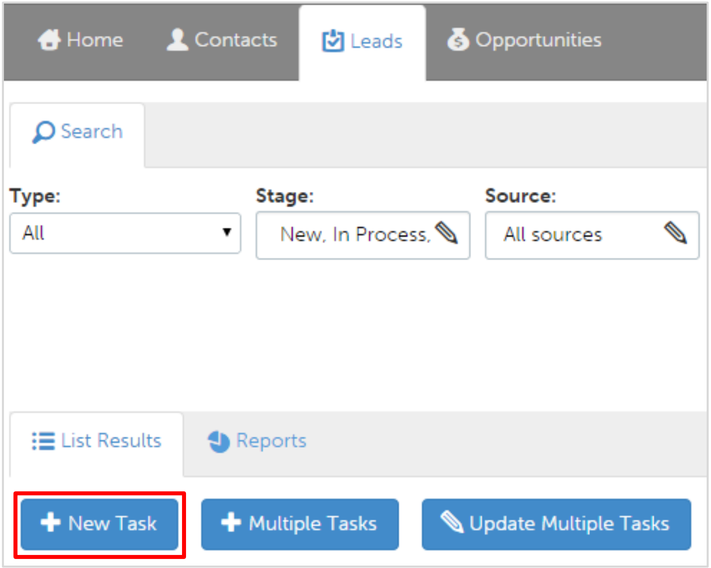
Converting Leads to Opportunities

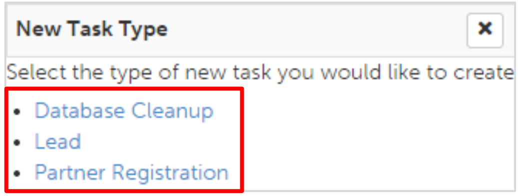
- Set the **Default sales track** based on the service or product the opportunity is interested in.
- When finished, click **Save**.
- The lead will now be available to manage as an opportunity in the **Opportunities** tab.
- To return to the lead portal, click the **Leads** tab at the top of the page.



Manually Creating Leads

- For campaigns run outside of StructuredWeb leads can be kept track of by manually creating leads.
- From the **Leads** tab, click **New Task** to create a lead. Set the type of lead from the list provided.
- Fill out the lead details. Description, Follow Up, Stage and Source are all required fields.



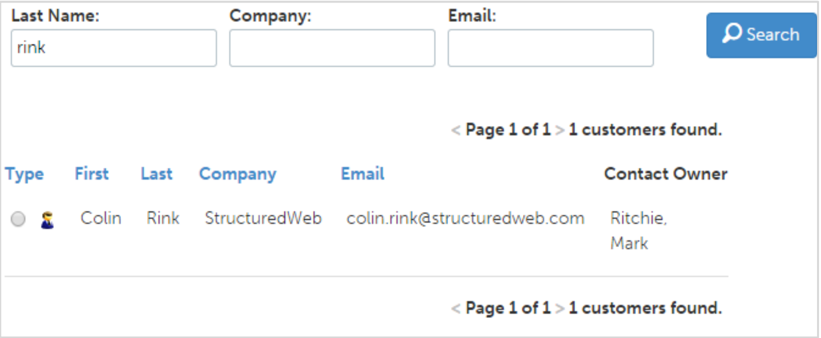


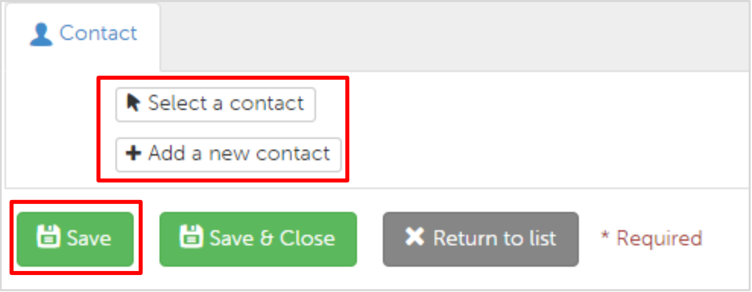
Manually Creating Leads

- Manually created leads are automatically assigned to the user that created them. To assign the lead to another rep, select them from the **Assigned To** drop down.

- A contact must be attached to the lead. **Select a contact** from the database or **Add a contact** if they have not yet been created.

- Click **Save** to save the lead in the system.





StructuredWeb

Additional Help

- Email
  - ✓ service@structuredweb.com
- Phone
  - ✓ 888-584-6480
- Online Support Center
  - ✓ support.structuredweb.com
- Product Walk Thru
- Chat