



# Lead Management User Guide

# Table of Contents

What you will find in this guide:

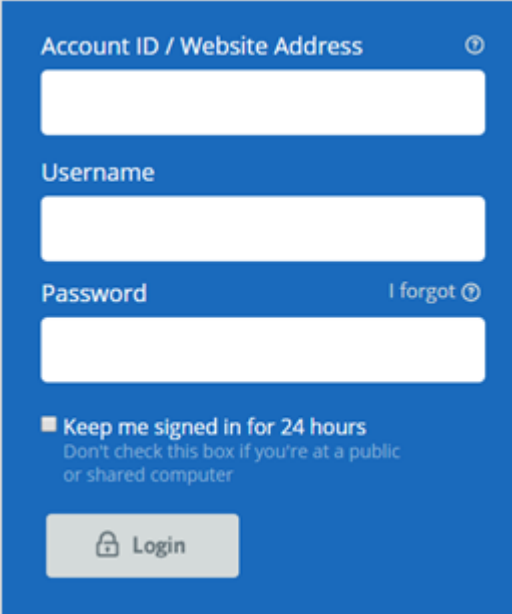
- Login
- Getting There
- Accessing Leads
- Managing Leads
- Converting to Opportunities
- Manually Creating Leads



# Login

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

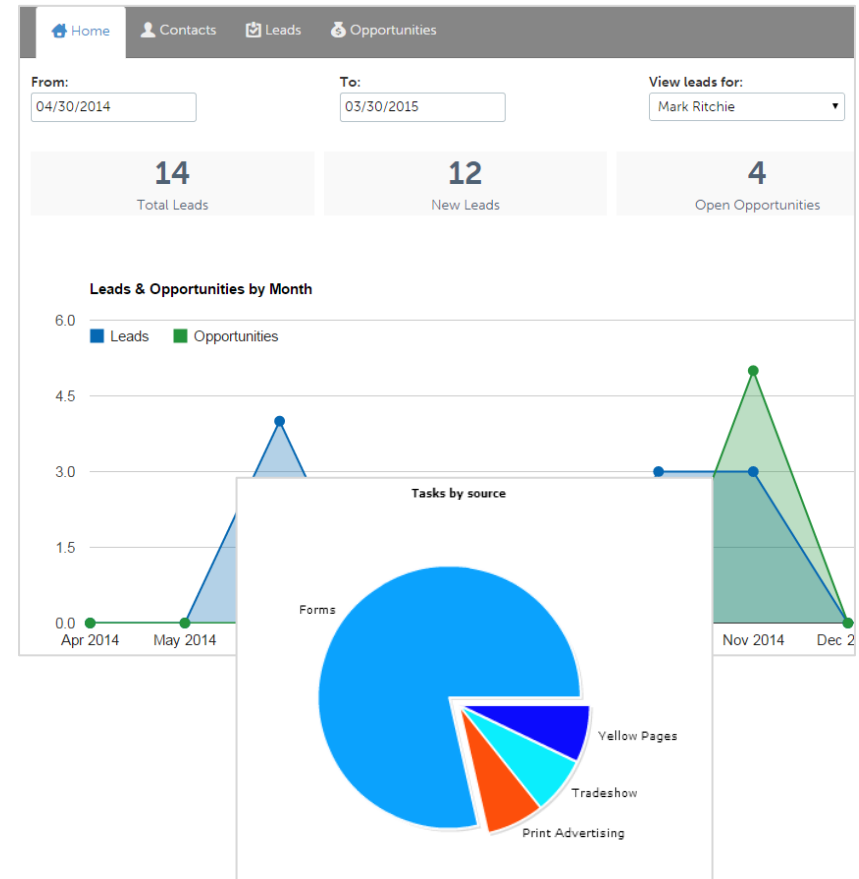
**Note:** If you forget your login information you can reset it by selecting the **I Forgot** link above the password field.



The image shows a login form with a blue background. It contains three input fields: 'Account ID / Website Address', 'Username', and 'Password'. The 'Password' field has a link 'I forgot' next to it. Below the fields is a checkbox labeled 'Keep me signed in for 24 hours' with a sub-note: 'Don't check this box if you're at a public or shared computer'. At the bottom is a 'Login' button with a lock icon.

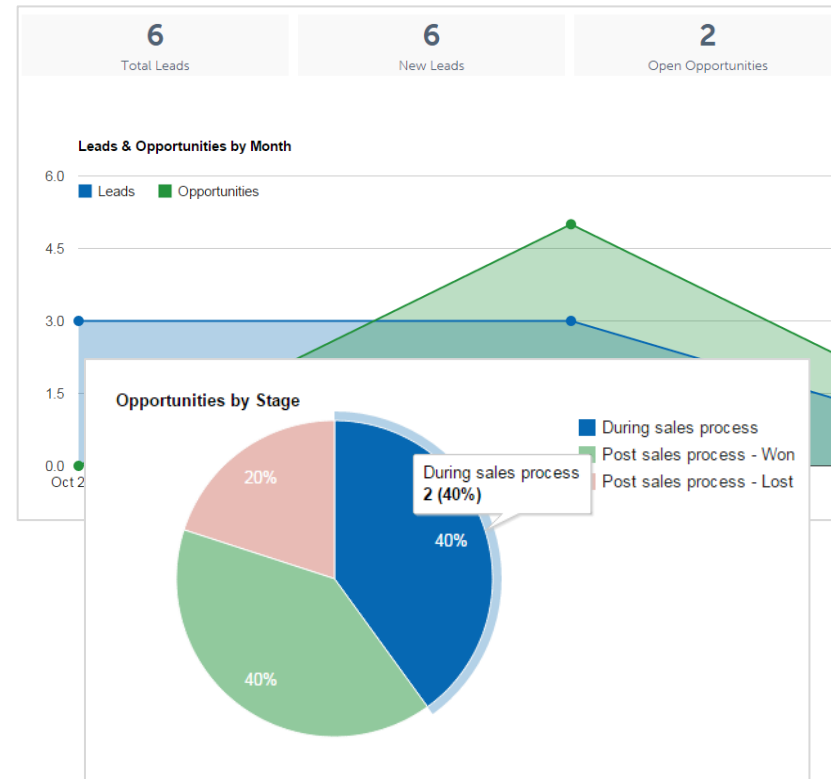
# Getting There

- 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.

The screenshot displays the StructuredWeb Lead Portal interface. At the top, there is a search bar and a filter section. The filter section includes dropdown menus for 'Type' (set to 'All'), 'Stage' (set to 'New, In Process'), and 'Source' (set to 'All sources'). There are also input fields for 'Created' with 'From' and 'To' labels. Below the filters, there are buttons for 'List Results', 'Reports', 'New Task', 'Multiple Tasks', 'Update Multiple Tasks', 'Delete Checked', and 'Export to'. The main content area shows 'Results 1 - 20 of 2466' and a list of leads. A search modal is open, showing 'Assigned To' (set to 'Ritchie, Mark') and 'Subject' (empty). The 'Contacts' section has radio buttons for 'All contacts' and 'Select contacts'. A red box highlights the 'Search' button in the modal.

# 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.

Contact	Follow Up	Stage	Assigned	Created ▼
Colin Rink StructuredWeb Director	03/23/2015	New Lead	Ritchie, Mark	03/23/2015
Greg Forster Greg's Copy Center 555-5551000	03/20/2015	Follow-up	Ritchie, Mark	03/13/2015
John Smith				11/17/2014

Follow Up	Stage	Assigned
03/23/2015		
03/20/2015		
11/17/2014		

**Change Task Stage** ✕

**New**

- New Lead
- Clicked
- Opened
- Form Submitted
- Inbound Call

**In Process**

- Attempting to Reach Out
- Left Several Messages

# 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.

Stage	Assigned	Created ▼	Source	Rate
New Lead	Ritchie, Mark	03/23/2015	Forms	☆
Follow-up	Ritchie, Mark	03/13/2015	Yellow Pages	☆
Form Submitted	Assigned	Created ▼		☆

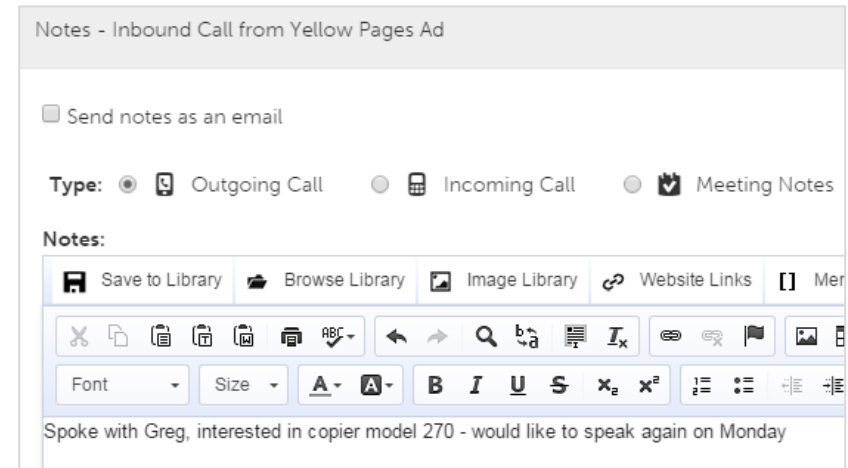
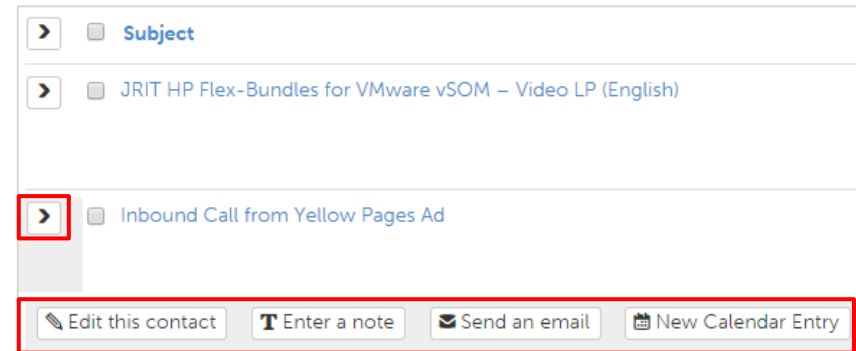
Change Task Assigned To ✕

- Forster, Greg
- Rink, Colin
- Ritchie, Mark



# 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.

The screenshot displays the StructuredWeb interface for managing leads. At the top, a table shows lead details:

Contact	Follow Up
Colin Rink StructuredWeb Director	03/28/2015

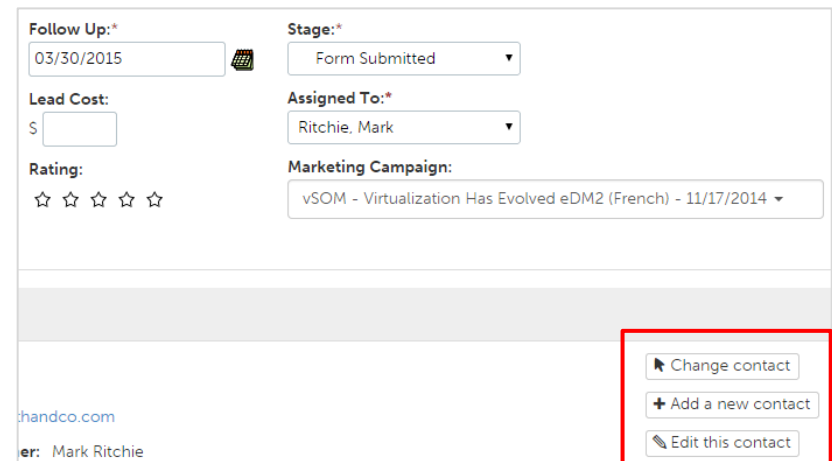
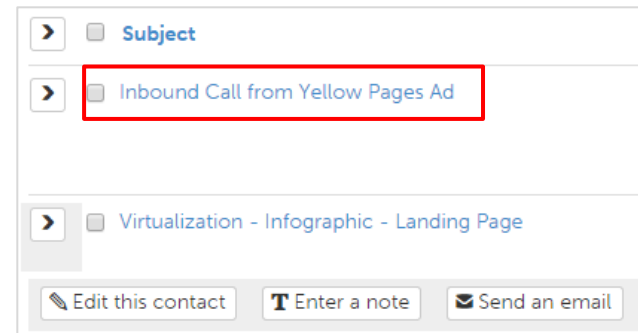
Below the table, three buttons are visible: **View Activity**, **+ Form**, and **View Forms**. The **View Activity** button is highlighted with a red box.

The **View Activity** window is open, showing a title bar: "View Activity - Virtualization - Infographic - Landing Page". The window content includes:

- History & Notes** section with a **Filter** button.
- Results summary: **Results 1 - 1 of 1**.
- A table with columns: **Date**, **Notes**, and **Entered By**.
- A single entry for **03/26/2015** with a note: "11:27 AM • Follow up date changed from 11/17/2014 to 03/30/2015". The entry was entered by **Ritchie, Mark**.
- Final results summary: **Results 1 - 1 of 1**.

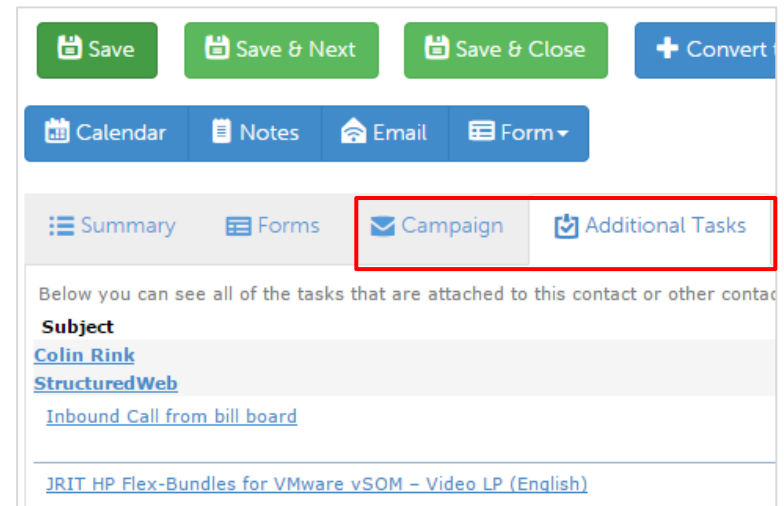
# Managing Leads

- 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 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.



The screenshot shows the top navigation bar with buttons for 'Save', 'Save & Next', 'Save & Close', and '+ Convert'. Below this is a secondary bar with 'Calendar', 'Notes', 'Email', and 'Form' options. A third bar contains tabs for 'Summary', 'Forms', 'Campaign', and 'Additional Tasks', with 'Campaign' highlighted by a red box. Below the tabs, there is a text area with the following content:

Below you can see all of the tasks that are attached to this contact or other contact

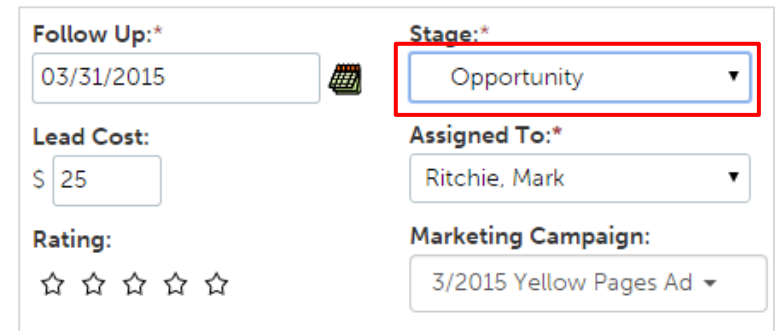
**Subject**  
[Colin Rink](#)  
[StructuredWeb](#)  
[Inbound Call from bill board](#)

[JRIT HP Flex-Bundles for VMware vSOM – Video LP \(English\)](#)

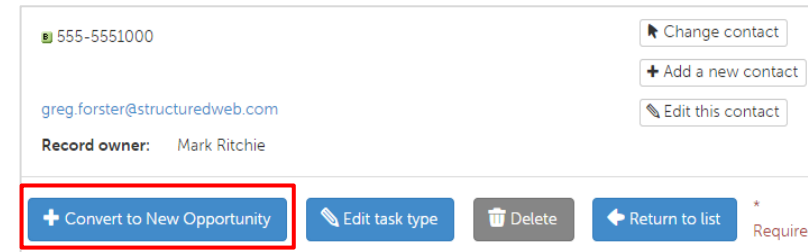
Follow Up	Stage	Assigned	Created	Source
<b>Director</b>				
03/27/2015	New	Ritchie, Mark	03/26/2015	Print Advertising
03/28/2015	New Lead	Ritchie, Mark	03/23/2015	Forms

# 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**.



The screenshot shows the 'Lead Details' page with several fields. The 'Follow Up:\*' field contains '03/31/2015'. The 'Lead Cost:' field contains '\$ 25'. The 'Rating:' field shows five stars. The 'Stage:\*' dropdown menu is highlighted with a red box and shows 'Opportunity' selected. The 'Assigned To:\*' dropdown menu shows 'Ritchie, Mark'. The 'Marketing Campaign:' dropdown menu shows '3/2015 Yellow Pages Ad'.



The screenshot shows the 'Lead Details' page with contact information. The phone number is '555-5551000', the email is 'greg.forster@structuredweb.com', and the record owner is 'Mark Ritchie'. The 'Convert to New Opportunity' button is highlighted with a red box. Other buttons include 'Change contact', 'Add a new contact', 'Edit this contact', 'Edit task type', 'Delete', and 'Return to list'. A red asterisk and the word 'Require' are visible next to the 'Return to list' button.

# 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.


**Short description:\***

**Amount:**

**Detailed Description:**

**Probability:**

**Profit Margin:**  
  
(%)

**Closing:**  
 

**Stage:\***  
- Evaluation ▼  
Select Stage  
During sales process  
- Demo Period  
- Solution Presentation  
- Presentation Deferred  
- Evaluation  
- Follow-up Presentation  
- Negotiating terms

# 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.

Select default sales track:\*

Select a sales track ▼

Select a sales track

Basic Product

Design Project

Advanced

Copier Lease Expiration

Dead

Furniture

Professional Services

Forms ▼

Related task

Forms: Virtualization - Inf ▼

Link to existing quote:

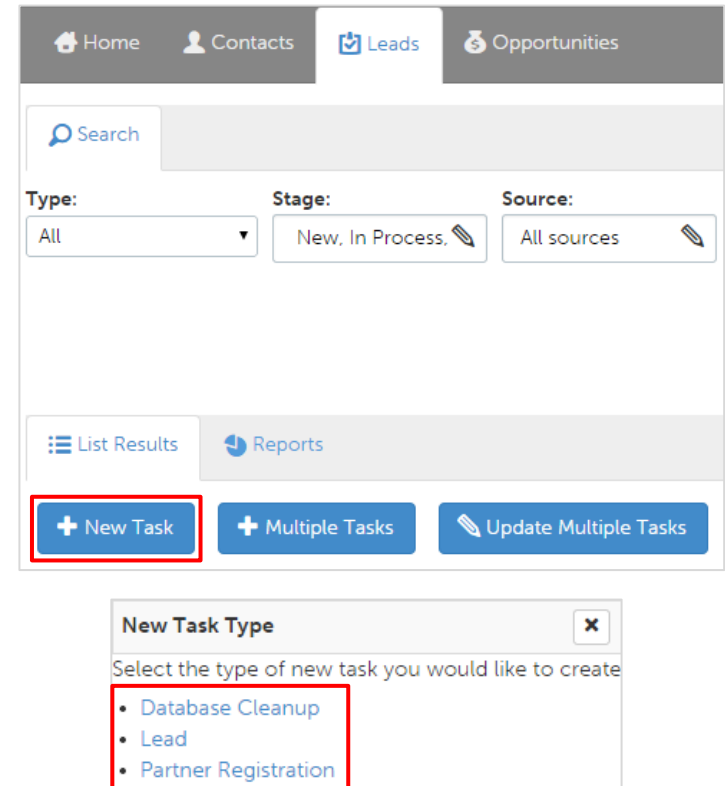
Select a Quote ▼

Save

← Back to Customer Summary

# 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.

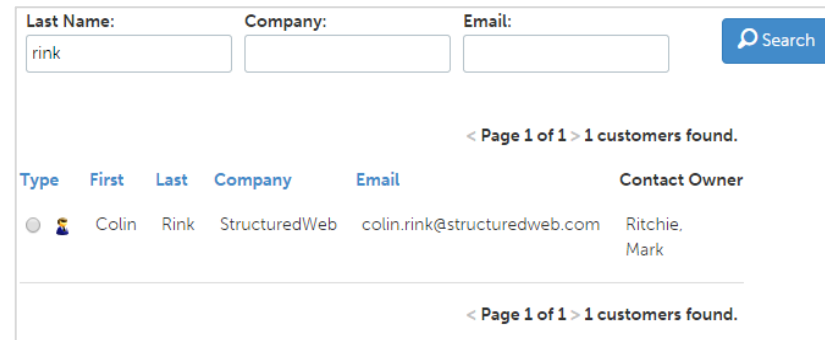


The screenshot displays the 'Leads' tab in the StructuredWeb interface. At the top, there are navigation tabs for Home, Contacts, Leads, and Opportunities. Below the navigation is a search bar and filter options for Type (All), Stage (New, In Process), and Source (All sources). A 'List Results' button and a 'Reports' button are also visible. The 'New Task' button is highlighted with a red box. Below it, a 'New Task Type' dropdown menu is open, showing a list of options: Database Cleanup, Lead, and Partner Registration. The 'Lead' option is highlighted with a red box.



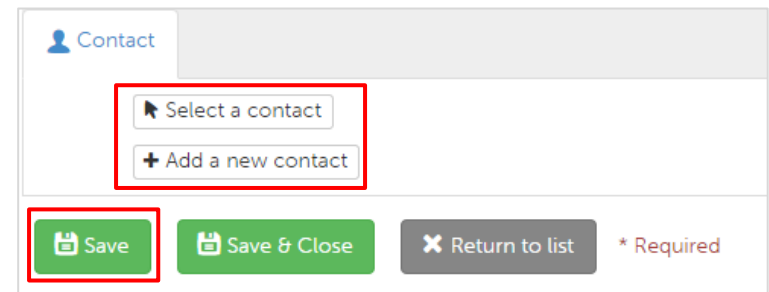
# Manually Creating Leads

- 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.



Search results for customers. The search criteria are: Last Name: rink, Company: [empty], Email: [empty]. The results show 1 customer found.

Type	First	Last	Company	Email	Contact Owner
<input type="radio"/>	Colin	Rink	StructuredWeb	colin.rink@structuredweb.com	Ritchie, Mark



Contact selection form. The form has a header 'Contact' and two buttons: 'Select a contact' and '+ Add a new contact'. Below the buttons are three buttons: 'Save', 'Save & Close', and 'Return to list'. The 'Save' button is highlighted with a red box.

# Additional Help

- Email
  - ✓ [service@structuredweb.com](mailto:service@structuredweb.com)
- Phone
  - ✓ 888-584-6480
- Online Support Center
  - ✓ [support.structuredweb.com](http://support.structuredweb.com)
- Product Walk Thru
- Chat

