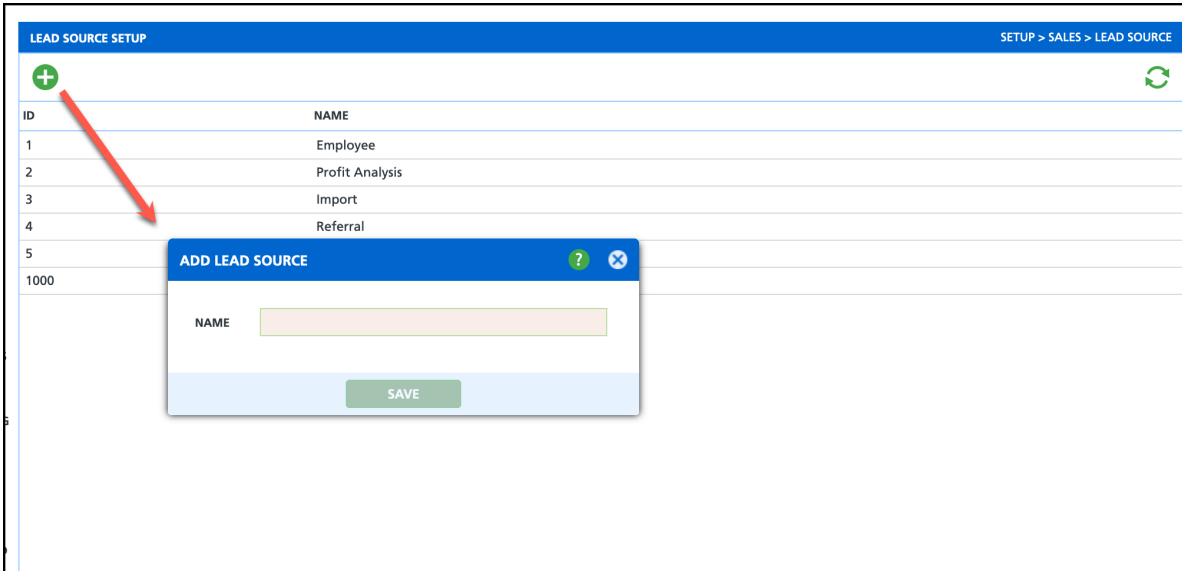


Lead Source

Last Modified on 08/09/2023 3:10 pm EDT

Pathway: *Setup > Sales > Lead Source*

The Lead Source Setup screen includes a pre-populated list of lead sources that are used to identify how a lead originated when it is created for a potential sale. Additionally, this screen offers the flexibility to manually add extra lead sources whenever necessary.



Permission Required

To view and edit the Lead Source Setup screen, users must have permission **26: Setup \ Sales**

Locations of Use

Lead Source is a drop down selection field located on the Add Lead screen. The identification of a lead source offers valuable insights into the effectiveness of various marketing and sales strategies.

Add Lead

Pathway: *Load Account > (select) Green + icon (Customer Service Screen) > Lead*

Related Article: [Add a Lead](#)

48954 | Test -Leads Analysis | 48954002 | Site 2

12341 Aberdeen St NE
Blaine, MN 55449-5144

Active
DIVISION: CORPUS
ACCOUNT MGR: House Account
CLASS: ROLL OFF PERM

2 of 2

ADD LEAD

LEAD SOURCE: Referral | LEAD REASON: Customer Referral | LEAD PROVIDED BY: Aliena Somers Aug 9,2023 01:53 pm

QUANTITY: [dropdown] | EQUIPMENT: Choose one [gear icon] | SERVICE CODE: [dropdown] | FREQUENCY: [dropdown] | PER UNIT: 0.00 | SVC FEES: 0.00

CURRENT PROVIDER: [dropdown] | CONTRACT EXPIRATION DATE: [calendar icon]

NOTE: [text area]

HIGHLIGHTS

ACTIVE SERVICES (3)

QTY	SERVICE CODE
1	10 Yard Open To
1	10 Yard Open To
1	20 Yard Compac

Leads Analysis

Pathway: [Sales > Leads Analysis](#)

Related Article: [Leads Analysis](#)

LEADS ANALYSIS						SALES > LEADS ANALYSIS		
FORMAT	DIVISION	LEAD SOURCE			CREATION DATE			
Provided By	All	Referral			All	LOAD		
	TOTAL LEADS	PENDING	PROPOSED	LOST	SOLD	% ACTION TAKEN	% SOLD	REVENUE
Henry Jones	1	1	0	0	0	0%	0%	0
Aliena Somers	2	0	0	1	0	50%	0%	0
Lori Sheldon	2	1	0	0	0	0%	0%	50
Rob Smith	1	1	0	0	0	0%	0%	365