Creating a Lead

I. Creating a Lead

1. Click on New Lead
2. Description – Prospect – Email or Prospect - Sample
3. Source – How you found them – Call in, website, etc.
4. Opened Date = Date you want the sample to be sent. Please note if only an Email lead
5. Company Name
6. Last Name/First Name
7. Email – If one is provided
8. Phone #
9. Street Address
    a. City
    b. State
    c. Zipcode
10. Click Save

II. Making Notes for a Lead

1. Go to communications Tab
2. Click New Task
3. Subject Line – Sample
4. Date Sample Sent – Should be date you want the sample sent
5. Action – Drop down to sample
6. Status – Complete
7. Check Complete Follow up
8. Click Save
9. Schedule a follow up for sample 2 – 3 weeks out