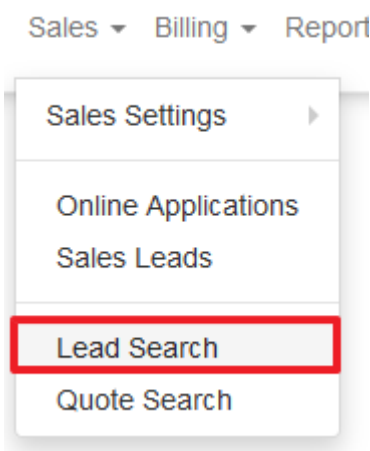


You will now be able to search across all lead statuses in the workflow and will be able to search for closed leads on one screen.

This screen is available from v1.21.04.

Go to Sales -> Lead Search



The workflow status will show in which status in the Workflow you will find the lead.

Lead Search

All Sales Agents | October 16, 2016 - October 16, 2017 | All | Refresh

All records per page | Search: | Copy Columns Clipboard | Export Columns CSV | Export Columns Excel | Show / Hide Columns

ID	Date	Contact Name	Phone	Email	Assigned To	Status	Address	Sales Agent	Workflow Status
248	2017-04-10 08:09:10	Budget Item	XXXXXXXXXX	XXXX@XXXXXXXXXX.COM	XXXXXXXXXX	Customer Contacted 17 hours ago	411 Courthouse Blvd, Suite 1000, Houston, TX 77002, United States	XXXXXXXXXX	Quotes New
252	2017-04-10 08:49:31	Test	XXXXXXXXXX	XXXX@XXXXXXXXXX.COM	XXXXXXXXXX	Job Card Scheduled 5 months ago	411 Courthouse Blvd, Suite 1000, Houston, TX 77002, United States	XXXXXXXXXX	Invoicing Active
270	2017-05-03 14:13:36	JC-Candidate	XXXXXXXXXX	XXXX@XXXXXXXXXX.COM	XXXXXXXXXX	Recurring Billing Confirmed 5 months ago	411 Courthouse Blvd, Suite 1000, Houston, TX 77002, United States	XXXXXXXXXX	Job Cards New
265	2017-04-28 13:02:18	Test	XXXXXXXXXX	XXXX@XXXXXXXXXX.COM	XXXXXXXXXX	Invoice Pushed 3 months ago	411 Courthouse Blvd, Suite 1000, Houston, TX 77002, United States	XXXXXXXXXX	Leads Success

Unhide Lead Type column to see how the lead was submitted

Meanings of the Lead Types:

- Direct Capture = Manually on system (Add sales lead on L2R)
- Quick Quote = Quote from customer's profile
- Admin User Captured = Quick sold lead from customer profile

- Email = via email
- Captured online = online application




View Sales Lead

Click on the green “View Sales Lead” button to open the lead from the search screen:

Lead Search

All Sales Agents | October 16, 2016 - October 16, 2017 | All | Refresh

All records per page | Search: | Copy Columns Clipboard | Export Columns CSV | Export Columns Excel | Show / Hide Columns

ID	Date	Contact Name	Phone	Email	Assigned To	Status	Address	Sales Agent	Workflow Status	
248	2017-04-10 08:59:10	Richard Lee	714-999-9999	richard.lee@herotel.com	Richard Lee	Customer Contacted 17 hours ago	10000 Main Street, Suite 1000, San Diego, CA 92101	Richard Lee	Quotes New	
252	2017-04-10 08:49:31	John	714-999-9999	john@herotel.com	John	Job Card Scheduled 5 months ago	10000 Main Street, Suite 1000, San Diego, CA 92101	John	Invoicing Active	
270	2017-05-03 14:13:36	John	714-999-9999	john@herotel.com	John	Recurring Billing Confirmed 5 months ago	10000 Main Street, Suite 1000, San Diego, CA 92101	John	Job Cards New	
265	2017-04-28 13:52:18	John	714-999-9999	john@herotel.com	John	Invoice Pushed 3 months ago	10000 Main Street, Suite 1000, San Diego, CA 92101	John	Leads Success	