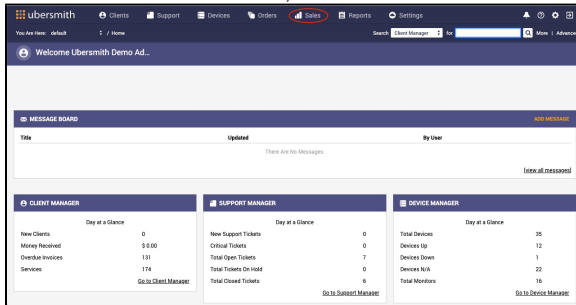


Managing Leads

Once you have [created a lead](#), you can perform various actions on it.

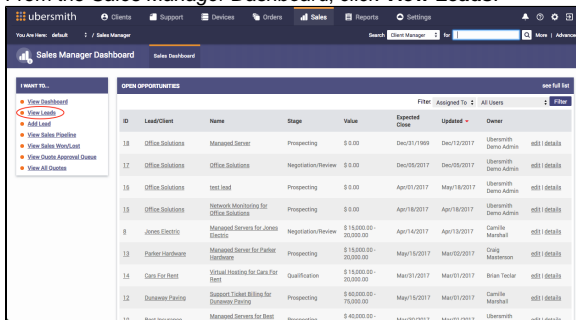
Access the View Lead Page

1. From the *Ubersmith Dashboard*, click **Sales**.



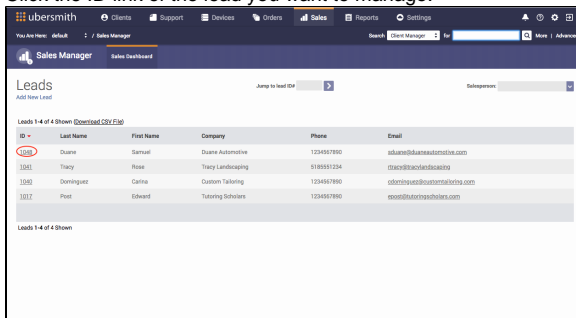
The *Sales Manager Dashboard* appears.

2. From the *Sales Manager Dashboard*, click **View Leads**.



The *Leads* page appears.

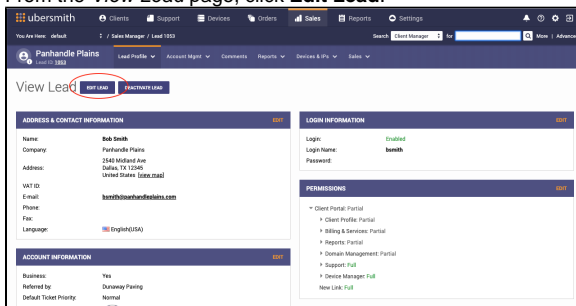
3. Click the ID link of the lead you want to manage.



The *View Lead* page appears.

Editing Leads

1. [Access the View Lead page](#).
2. From the *View Lead* page, click **Edit Lead**.



The *Edit Lead* page appears.

3. Make any necessary updates.

On this page:

On this page:

- [Access the View Lead Page](#)
- [Editing Leads](#)
- [Deactivating Leads](#)
- [Reactivating Leads](#)
- [Converting Leads to Clients](#)
- [Related Topics](#)

Note

If you need to change the lead's email address, you must first provide **your** current password in the *Address & Contact Information* section.

4. Click **Save**.

ubersmith

Edit Lead

Panhandle Plains
Lead ID: 1003

Contact Info Account Info Custom Fields

First Name: Bob
Last Name: Smith
Company: Panhandle Plains
Country/Territory: United States
Address: 2540 Midland Ave
City: Dallas
State: Texas ZIP Code: 75241
WAT ID:
Phone: Fax:
Email: bsmith@panhandleplains.com
Language: English(USA)

Save Cancel

Deactivating Leads

If you deactivate a lead, you will remove that lead from the *Leads* page, but any associated opportunities will remain.

1. Access the [View Lead](#) page.
2. From the *View Lead* page, click **Deactivate Lead**.

ubersmith

You Are Here: default / Sales Manager / Lead 1003

Panhandle Plains Lead ID: 1003

Lead Profile Account Mgmt Comments Reports Devices & I/O Sales

View Lead

1003 Lead Deactivate Lead

ADDRESS & CONTACT INFORMATION

Name: Bob Smith
Company: Panhandle Plains
Address: 2540 Midland Ave, Dallas, TX 75241
Country: United States (Select State)
WAT ID:
Email: bsmith@panhandleplains.com
Phone:
Fax:
Language: English(USA)

ACCOUNT INFORMATION

Business: Yes
Referred by: Duwayne Panning
Default Ticket Priority: Normal
Custom:

LOGIN INFORMATION

Login: Enabled
Login Name: bsmith
Password:

PERMISSIONS

- Client Portal: Partial
- Client Profile: Partial
- Billing & Services: Partial
- Reports: Partial
- Device Management: Partial
- Support Tool: Full
- Device Manager: Full
- New Link: Full

The *Deactivate Client* page appears.

3. Click **Deactivate Client**.

ubersmith

You Are Here: default / Sales Manager / Lead 1003

Duane Automotive Sales Lead ID: 1003

Lead Profile Account Mgmt Comments Reports Devices & I/O Sales

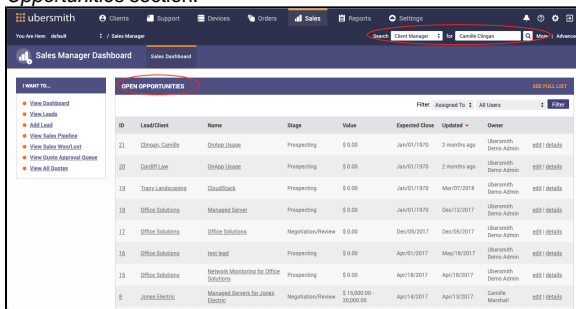
Deactivate Client

WARNING: You are about to deactivate a client. This action will deactivate all services and credits, it will remove any queued charges, and it will disregard any outstanding invoices. Reactivating a client will not restore deactivated services, credits, queue charges or invoices. Would you like to proceed with deactivating this client?

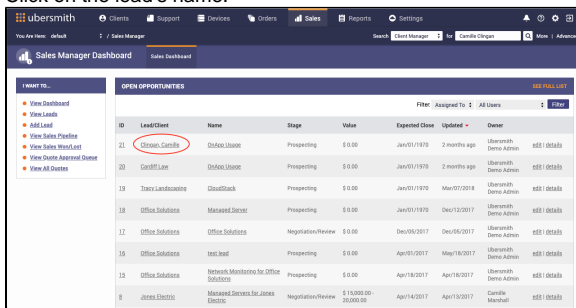
Deactivate Client Cancel

Reactivating Leads

1. Either search for the deactivated lead through the *Search* section or the *Sales Dashboard*, *Open Opportunities* section.

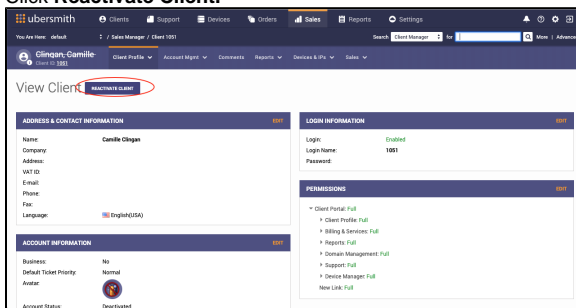


2. Click on the lead's name.



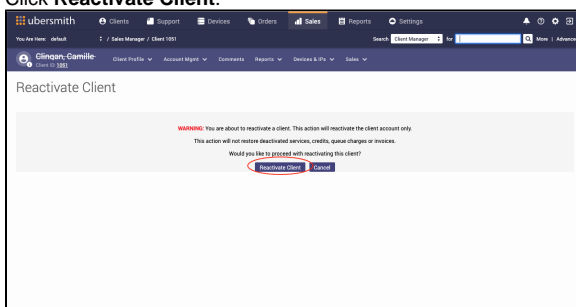
The *View Client* page appears.

3. Click *Reactivate Client*.



The *Reactivate Client* page appears.

4. Click *Reactivate Client*.



The *View Lead* page appears.

Converting Leads to Clients

You can convert a lead to a client at any time, either manually or automatically. When a service is sold, the Order Manager automatically converts a lead to a client when the order's Provision Client order action is run. The steps below explain how to do this manually.

1. Access the *View Lead* page.

2. Click **Edit Lead**.

The screenshot shows the 'View Lead' page for a lead named 'Clingan, Camille' with Lead ID 1051. The page has a top navigation bar with tabs like Clients, Support, Devices, Orders, Sales, Reports, and Settings. Below the navigation bar, there are tabs for 'View Lead', 'EDIT LEAD' (circled in red), and 'MULTIPLE LEAD'. The main content area is divided into three sections: 'ADDRESS & CONTACT INFORMATION', 'ACCOUNT INFORMATION', and 'LOGIN INFORMATION'. The 'ADDRESS & CONTACT INFORMATION' section shows fields for Name, Company, Address, VAT ID, Email, Phone, Fax, and Language. The 'ACCOUNT INFORMATION' section shows fields for Business, Default Ticket Priority, and Avatar. The 'LOGIN INFORMATION' section shows fields for Login, Login Name, and Password. The 'PERMISSIONS' section shows a list of permissions with checkboxes for 'Client Portal', 'Client Profile', 'Billing & Services', 'Reports', 'Domain Management', 'Support', and 'Device Manager'.

The *Edit Lead* page appears.

3. From the *Account Info* tab, in the **Status** field, select **Active**.

4. Click **Save**.

The screenshot shows the 'Edit Lead' page for a lead named 'Clingan, Camille' with Lead ID 1051. The page has a top navigation bar with tabs like Contract Info, Account Info (selected), and Custom Fields. The main content area shows fields for Business (Yes/No), Referred By, Default Ticket Priority (Normal), Status (Active, circled in red), and Avatar (Gravatar/Custom Avatar). At the bottom right, there are 'Save' and 'Cancel' buttons, with the 'Save' button circled in red.

Related Topics

[Adding Leads](#)