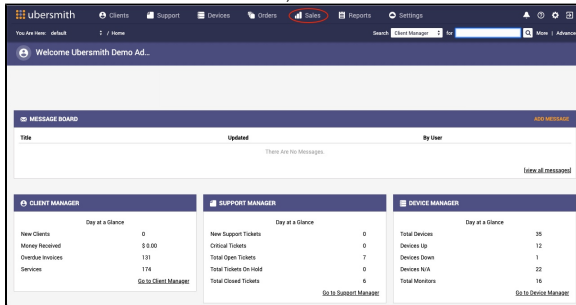


Managing Leads

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

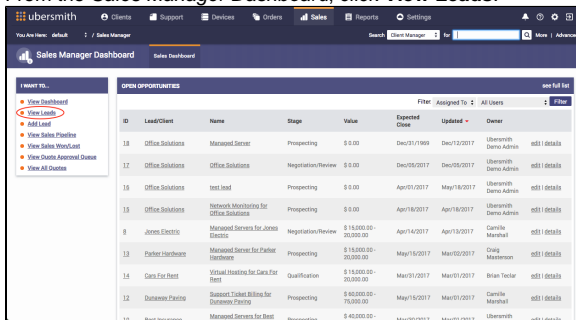
Access the View Lead Page

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



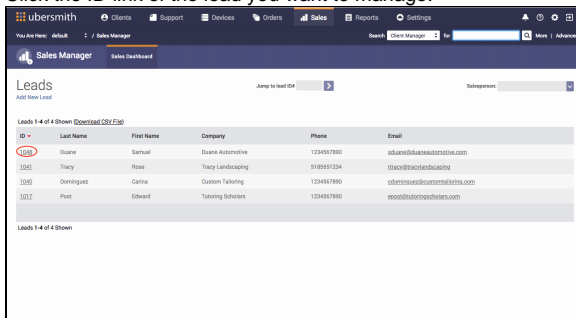
The *Sales Manager Dashboard* appears.

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



The *Leads* page appears.

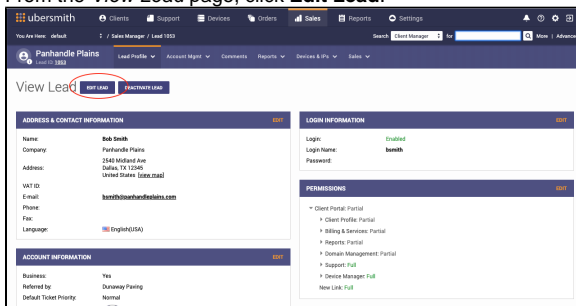
3. Click the ID link of the lead you want to manage.



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**.

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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

View Lead Panhandle Plains Lead ID: 1003

Deactivate Lead

ADDRESS & CONTACT INFORMATION

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

ACCOUNT INFORMATION

Business: Yes
Referred by: Duwayne Panning
Default Ticket Priority: Normal
Status: Active

LOGIN INFORMATION

Login: Enabled
Login Name: bsmith
Password:

PERMISSIONS

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

The *Deactivate Client* page appears.

3. Click **Deactivate Client**.

ubersmith

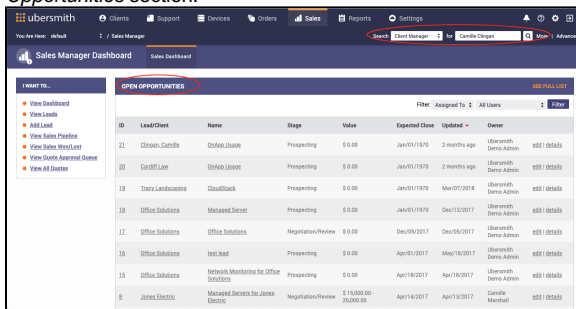
Deactivate Client Duane Automotive Sales Lead ID: 1008

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?

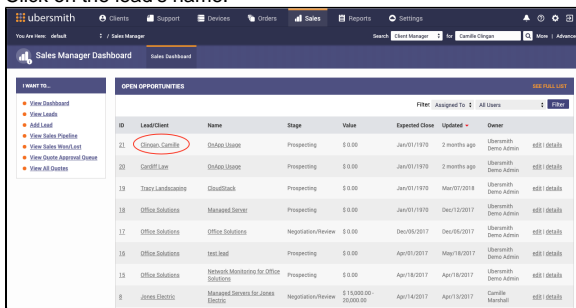
Deactivate Client **Cancel**

Reactivating Leads

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

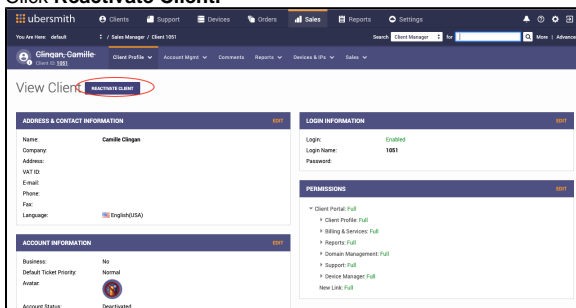


2. Click on the lead's name.



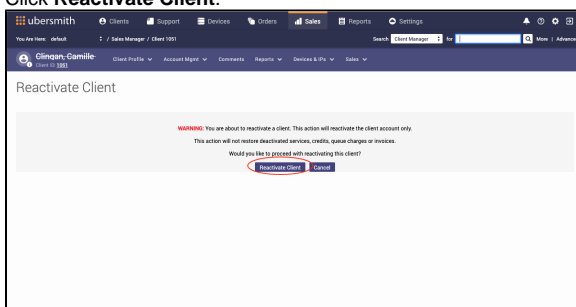
The *View Client* page appears.

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 Camille Clingan. The page has a dark blue header with the 'ubersmith' logo and navigation tabs: Clients, Support, Devices, Orders, Sales, Reports, and Settings. Below the header, there's a sub-header with 'Lead Profile', 'Account Mgmt', 'Connections', 'Reports', 'Devices & I/O', and 'Sales'. The main content area is titled 'View Lead' and has two tabs: 'VIEW LEAD' and 'MULTI-STEP LEAD'. The 'VIEW LEAD' tab is active. The page is divided into three main sections: 'ADDRESS & CONTACT INFORMATION', 'LOGIN INFORMATION', and 'PERMISSIONS'. The 'ADDRESS & CONTACT INFORMATION' section includes fields for Name, Company, Address, VAT ID, Email, Phone, Fax, and Language. The 'LOGIN INFORMATION' section includes fields for Login, Login Name, and Password. The 'PERMISSIONS' section lists various roles and their associated permissions.

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 Camille Clingan. The page has a dark blue header with the 'ubersmith' logo and navigation tabs: Contract Info, Account Info, and Custom Fields. The 'Account Info' tab is active. The main content area is titled 'Edit Lead' and has a sub-header with 'Contract Info', 'Account Info', and 'Custom Fields'. The 'Account Info' section includes fields for Business, Referred By, Default Ticket Priority, Status, and Avatar. The 'Status' dropdown menu is open, showing 'Active' selected. The 'Avatar' section includes a 'Choose File' button and a 'No file chosen' message. At the bottom right, there are 'Save' and 'Cancel' buttons, with the 'Save' button circled in red.

Related Topics

[Adding Leads](#)