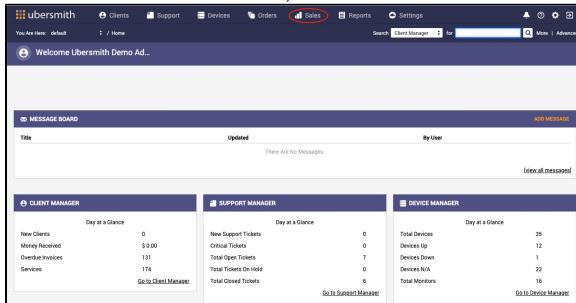


Adding Leads

A lead is a potential client that can be managed in the *Sales Manager*. Once a service is sold, the lead will be converted to a full client when a contract is signed and their order is processed.

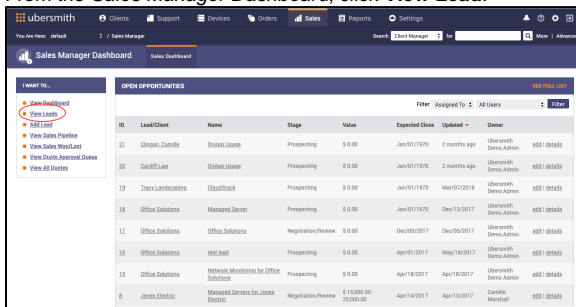
Access the Leads Page

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



The *Sales Manager Dashboard* appears.

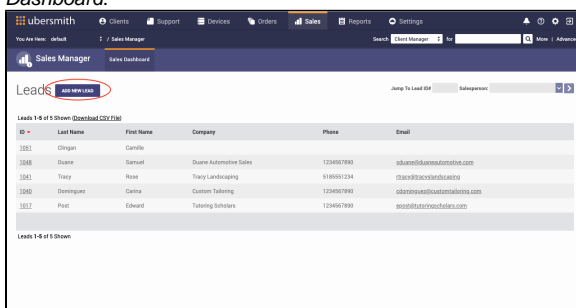
2. From the *Sales Manager Dashboard*, click **View Lead**.



The *Leads* page appears.

Complete the Add New Leads Page

- From the *Leads* page, click **Add New Lead**. The *Add New Lead* page appears. You can also add new leads from the *Add Lead* section or the **Add Lead** link on the *Sales Manager Dashboard*.



Complete the Contact Info Tab

1. In the **First Name** field, enter the lead's first name.
2. In the **Last Name** field, enter the lead's last name.
3. In the **Company** field, enter the lead's company.
4. In the **Country/Territory** field, select the country or territory the lead's company resides in.
5. In the **Address** field, enter the lead's address.
6. In the **City** field, enter the lead's city.
7. In the **State** field, select the lead's state.
8. In the **ZIP Code** field, enter the lead's ZIP code.
9. In the **VAT ID** field, enter the lead's value added tax ID number.
10. In the **Phone** field, enter the lead's telephone number.
11. In the **Fax** field, enter the lead's fax number.
12. In the **Email** field, enter the lead's email address, which will be used as the default address for billing and account-related emails.
13. In the **Language** field, select the lead's language.

On this page:

On this page:

- [Access the Leads Page](#)
- [Complete the Add New Leads Page](#)
 - [Complete the Contact Info Tab](#)
- [Complete the Login & Password Tab](#)
- [Complete the Account Info Tab](#)
- [Complete the Permissions Tab](#)
- [Complete the Custom Fields Tab](#)
- [Related Topics](#)

14. In the **Salesperson** field, select the lead's sales person.

ubersmith

Add New Lead

Contact Info Login & Password Account Info Permissions 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: 12345

VAT ID:

Phone: Fax:

Email: bsmith@panhandleplains.com

Language: English(USA)

Salesperson: Ubersmith Demo Admin

Fields marked with a red asterisk are required. Save Save & New Cancel

Complete the Login & Password Tab

1. Click the *Login & Password* tab.
2. Select the **Enable Login** field to give the client user access to Ubersmith's Client Portal.
3. In the **Login** field, enter the lead's login ID.
4. In the **Password** field, enter the lead's password.
5. Click the **auto generate** link to have Ubersmith generate a password.
6. In the **Confirm Password** field, enter the lead's password a second time.

ubersmith

Add New Lead

Contact Info **Login & Password** Account Info Permissions Custom Fields

Password Requirements:

- Password must not be the same as the username
- Password must be at least 7 characters
- Password must contain both alphabetic and numeric characters
- Password cannot be one of the last 4 passwords used

Enable Login: ☒

Login: bsmith

Password: Strong [Auto Generate](#)

Confirm Password:

Fields marked with a red asterisk are required. Save Save & New Cancel

Complete the Account Info Tab

This tab sets permission for Ubersmith's Client Portal.

1. Click the *Account Info* tab.
2. In the **Business** field, select **Yes** if your lead is a business or **No** if your lead is an individual.
3. In the **Referred By** field, enter the name of the person who referred your lead.
4. In the **Default Ticket Priority** field, select the priority of any submitted support tickets.
5. In the **Avatar** field, select either **Default Avatar** or **Custom Avatar**. If you selected **Custom Avatar**, the **Choose File** field enables.
6. Click **Choose File**, navigate to the location of your avatar file, and click **Open**. A 50 x 50 pixel GIF, JPG, or PNG file can be uploaded and used as your avatar. In order to enable the **Avatar** field, you must select either **Admin Interface Only** or **Admin & Client Interface** in the *Support General Settings* page. To display client avatars, your client needs to upload a file to [gravatar](#).

com, which Ubersmith will pull from.

The screenshot shows the 'Add New Lead' form in the Ubersmith application. The 'Account Info' tab is selected and highlighted with a red circle. The form includes fields for 'Business' (radio buttons for Yes/No), 'Referred By' (a dropdown menu showing 'Dunaway Paving'), 'Default Ticket Priority' (a dropdown menu showing 'Normal'), and 'Avatar' (radio buttons for Gravatar and Custom Avatar, with a 'Choose File' button and 'No file chosen' text). At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons, along with a note: 'Fields marked with a red asterisk are required.'

Complete the Permissions Tab

1. Click the *Permissions* tab.
2. Expand each appropriate Ubersmith section.
3. In the **View**, **Create**, **Update**, and **Delete** column select the appropriate permission for each system function. Select **Allow** to let the lead view the section, select **Inherit** to use the previously assigned permission, or select **Deny** to not allow the lead access.

The screenshot shows the 'Add New Lead' form in the Ubersmith application, with the 'Permissions' tab selected and highlighted with a red circle. The form displays a table of permissions for various resources. The table has columns for 'Resources', 'View', 'Create', 'Update', and 'Delete'. The 'View' column is currently expanded, showing a list of resources with their corresponding permissions. The permissions are set to 'Inherit' for most resources, except for 'Client Portal' which is set to '(None)'. The 'Create', 'Update', and 'Delete' columns are currently collapsed, showing '(None)' for all resources. At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons, along with a note: 'Fields marked with a red asterisk are required.'

Resources	View	Create	Update	Delete
Client Portal	(None)	(None)	(None)	(None)
▼ Client Profile	Inherit	Inherit	Inherit	Inherit
Profile	(Inherit)	(Inherit)	(Inherit)	(Inherit)
Payment Methods	(Inherit)	(Inherit)	(Inherit)	(Inherit)
Change Password	(Inherit)	-	(Inherit)	-
Manage Contacts	(Inherit)	(Inherit)	(Inherit)	(Inherit)
Manage Contact Facility Access	(Inherit)	(Inherit)	(Inherit)	(Inherit)
► Billing & Services	Inherit	Inherit	Inherit	Inherit
► Reports	Inherit	Inherit	Inherit	Inherit
► Domain Management	Inherit	Inherit	Inherit	Inherit
► Support	Inherit	Inherit	Inherit	Inherit
► Device Manager	Inherit	Inherit	Inherit	Inherit
New Link	Inherit	-	-	-

Complete the Custom Fields Tab

1. Click the *Custom Fields* tab.
2. If you have any custom lead fields set up in your Ubersmith instance, they will display here.

3. Click **Save** or **Save & New**.

The screenshot shows the 'Add New Lead' form in the ubersmith application. The 'Custom Fields' tab is selected and circled in red. The form contains the following sections:

- Cloud Billing**: Cloud Account ID: [text input]
- SolusVM**: SolusVM Client ID: [text input], SolusVM Client Username: [text input], SolusVM Client Password: [text input], SolusVM Host Device ID: [text input]
- Solato**: DNPJ: [text input], GPI: [text input]
- Similar Clients**: Retail: ☐ Yes ☒ No

Fields marked with a red asterisk are required.

At the bottom, the 'Save' and 'Save & New' buttons are circled in red.

Related Topics

[Managing Leads](#)