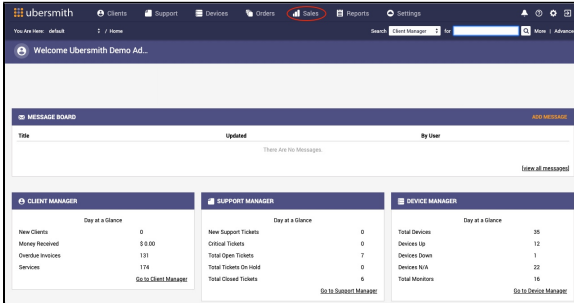


Adding Leads

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.

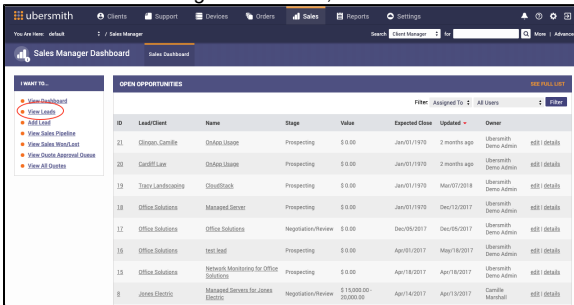
Access the Leads Page

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



The *Sales Manager Dashboard* appears.

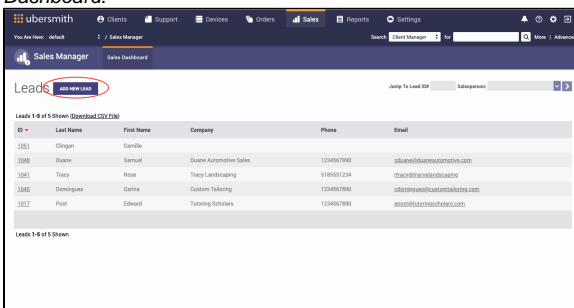
2. From the *Sales Manager Dashboard*, click **View Lead**.



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.

ubersmith

Add New Lead

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

Business: Yes No ?

Referred By: Dunaway Paving

Default Ticket Priority: Normal

Avatar: Gravatar ? Custom Avatar ?
Choose File No file chosen

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.

ubersmith

Add New Lead

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

Filter resources: () shows inherited value

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 ▾	-	-	-

Fields marked with a red asterisk are required.

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 and fields:

- 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)
- Boleto**: DNPJ (text input), CPF (text input)
- Similar Clients**: Retail (radio buttons for Yes and No, with No selected)

At the bottom of the form, there is a note: "Fields marked with a red asterisk are required." Below this note are three buttons: "Save", "Save & New", and "Cancel". The "Save" and "Save & New" buttons are circled in red.

Related Topics

[Managing Leads](#)