

# Closing Leads

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When closing a lead, aACE helps you track wins and losses.

1. Navigate to **Menu > CRM & Sales > Leads**.
2. Use the [Quick Search](http://aace5.knowledgeowl.com/help/using-the-quick-search-bar) (<http://aace5.knowledgeowl.com/help/using-the-quick-search-bar>) bar to locate the desired lead.
3. In the detail view menu bar, click **Actions > Close Lead**.
4. Specify whether the lead was **Won** or **Lost**.

- For leads that you won:
    - Notes – Record any final details about this business opportunity.
    - Orders & Quotes – If there were multiple quotes, select those that the customer chose. aACE will automatically open that order and void the others.
  - For leads that were lost,
    - Reason for Loss – Select from the dropdown list.  
Note: If a new reason may be relevant to multiple leads, you can ask your system administrator to update the system preferences, editing the value lists that are available via Database Management.
    - Reason for Loss Notes – Add details to help clarify the situation or improve future efforts.
5. Click **Close Lead**.

## Tips

**Required Fields** – Your system administrator can set flags to make the Campaign, Type, Route, or Source fields required (Menu > System Admin > Preferences > Order Entry). aACE validates these fields when you close the lead, requiring you to enter data before allowing the lead to be saved as Won or Lost.