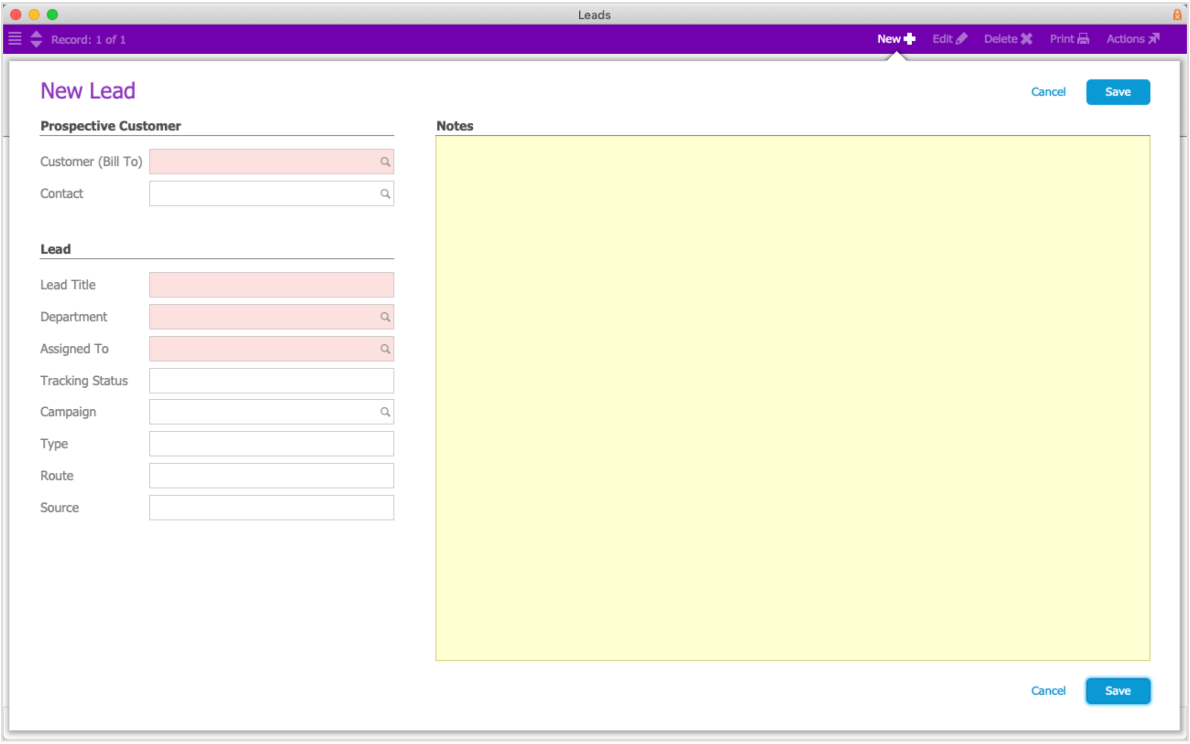
Creating Leads

Last Modified on 03/27/2019 1:36 pm EDT

In aACE, each lead represents a business opportunity, linked to a Company (and optionally, to a Contact). You can associate leads with both new and existing customers (e.g. creating a lead each time you provide a quote).

1. At the Leads module, click **New**.



2. At the new Leads dialog, select the appropriate company from the **Customer** drop-down list. If the company has a default contact, it is automatically added to the lead. Note: You can also create new Company or Contact records from this dialog. In either field, click the Search icon ( ), then at the Selector dialog, click the Plus icon ( ).
3. In the Lead section, enter the needed details (required fields are highlighted with pink in aACE):
    - Lead Title — Defaults to the customer name. You can enter a more specific title (e.g. New Year Promo, Door Upgrade @ 123 Main St, etc) to help identify opportunities, or to track multiple leads for a single customer or campaign.
    - Department — Auto-populates with *your* department abbreviation.
    - Assigned To — Auto-populates with your office's Sales Department traffic manager.

    - Tracking Status — An internal description of what stage the lead is at. You can click the Edit option and create additional options.
    - Campaign — Select an existing campaign to help track ROI on that marketing initiative. If the campaign has an aACE Template associated with it, the initial order will auto-generate when you open the lead.
    - Type — Select an entry from the dropdown list:
        - If the entry is a basic category, it will simply identify the lead type.
        - If the entry is an existing template , aACE will identify the type and also auto-generate the first order.
          (Note: You can also manually enter the name of an existing task group , aACE will identify the type and also auto-populate the lead's Task list, for example with steps for a standard sales process.)
    - Route — Select the method used in contacting the customer. You can click the Edit option and create additional options.
    - Source — Select the method that initiated the customer's interest in the opportunity. You can click the Edit option and create additional options (e.g. a specific referral website).
      Note: Options you add to the Tracking Status, Route, or Source lists will be available to all team members.
4. In the Notes field, you can elaborate on details about the opportunity, including pasting text into this field. These comments are visible on the Leads module list view, when you click the Notes icon ( ).
   Note: Follow-up information is better managed in the Lead record's Comments & Next Steps field after you open the lead . [draft status: editor link]
5. Click **Save**.

Other Ways to Create Leads

- **Leads module list view > Actions > Import Leads** — Using the aACE process for importing records , you can create lead records from information on a spreadsheet (e.g. a list of opportunities gathered at a convention or trade show). This method also creates new Company and Contact records if your spreadsheet includes that information. (Note: Be sure to review your information for typos; a misspelling on a company or contact name will create new records instead of linking leads to an existing record.)
- **Companies module list view > Actions > Create Leads for Companies in List** — Generates new lead records for each company currently displayed. This method prompts you to enter a lead title that will be used for each company's lead.

- **Contacts module list view > Actions > Create Leads for Contacts in List** — Same as with companies (above).

Tips

- **Auto-generating Orders** — You can only auto-generate orders or tasks when you create leads at the New Lead dialog. For existing leads already in Open status, specifying a Campaign or Type will *not* auto-generate any other records.
- **Competing Templates** — If you specify a Campaign with a template associated *and also* enter a Type that matches an existing template name, the auto-generated order will come from the Campaign. However, if the specified campaign does *not* have a template associated, while the Type does, the auto-generated order will come from the Type.
- **Repeated Leads** — You can duplicate existing leads, preserving the Priority, Goal, Likely %, and Est Close Date data. At the Leads detail view, click Actions > Duplicate Lead.
- **Accidental Lead Records** — If you create a lead accidentally, you can void it. At the Leads detail view, click Actions > Void Lead.