Lead Management Module
Quick Guide

How to use the Lead Management Module

Lead Management Module
Quick Guide

1. What is the Lead Management Module?

The Lead Management Module is a tool to manage the lead process easily and effectively. This module will help the company in ensuring that the valuable leads generated will be converted into opportunity. The module can streamline the process and may prevent errors that can occur by using a manual process.

2. How can I access the Lead Management Module?

The Lead Management module can be accessed in different ways:

2.1. Dashboard

1. Upon logging in, you will be directed to the dashboard/homepage.
2. Clicking the Lead Management link from the left side menu of the page or module abbreviation through the module widget (LM) will redirect you to the module's summary page.

How to Use Lead Management Module V1.00
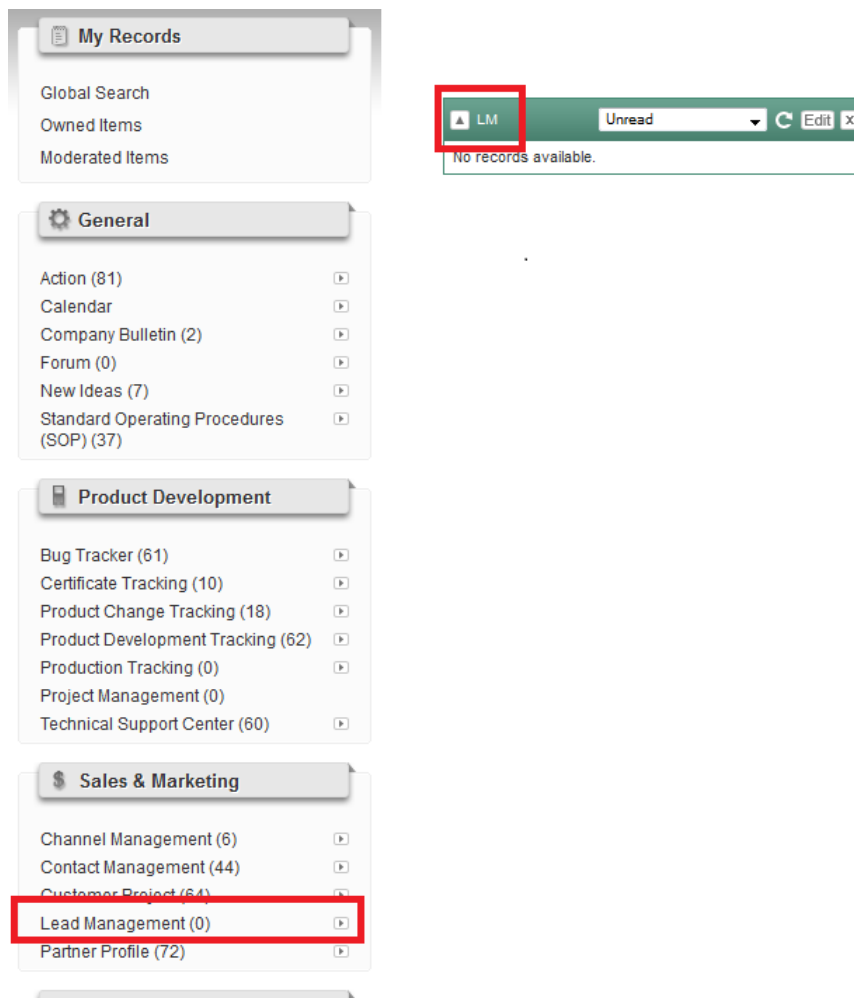
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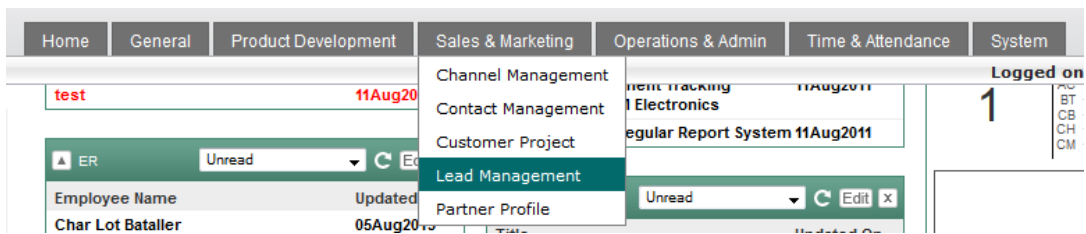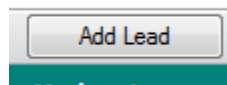
2.2. Menu Tab > Sales & Marketing category

1. You can also access the module through the menu header tabs by going to the Sales & Marketing tab/category which you can see Lead Management link.
2. Clicking the link will redirect you to the summary page.

3. How can I add a lead item?

You can easily add a lead item through the summary table. Simply click the "Add Lead" button located on the rightmost side of the State Bar. If you don't see this button, please contact your system administrator.

3.1. Add Lead Field Details
1. General Information:

a. Company Name – type the company name of the lead.
b. Given Name – type the first name of the lead contact.
c. Middle Name – type the middle name of the lead contact (optional).
d. Family Name – type the surname or last name of the lead contact.
e. Display Name – type the name you want to display for the lead contact. Given name and family name by default.
f. Phone – type the contact details of the lead. You have the following options: office 1 and 2, mobile, home and fax.
g. Email address – type the email address of the lead contact.

2. Lead Details:
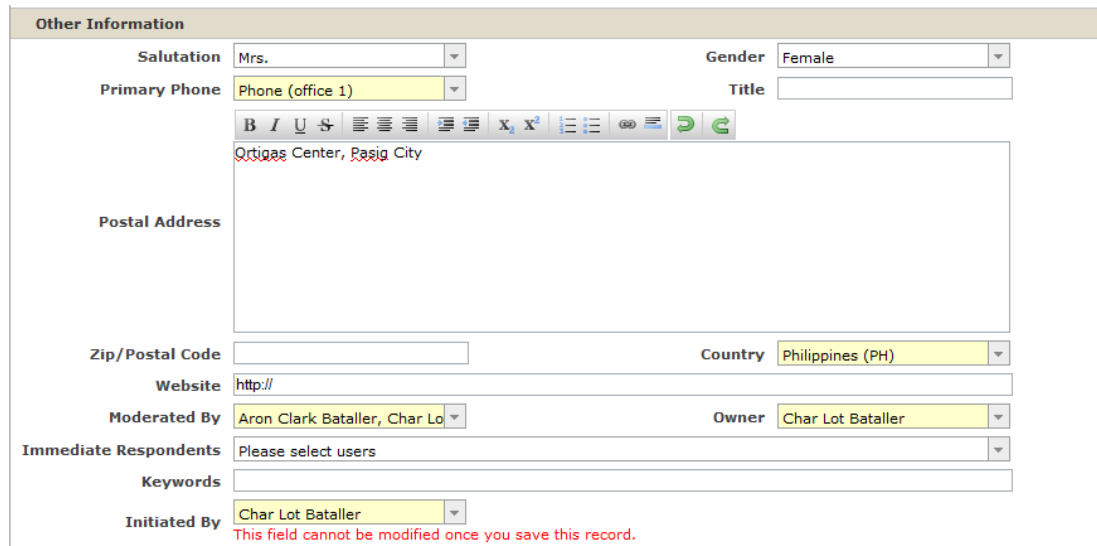
a. Source – source where the lead came from.
b. State – by default, this field is disabled, new leads must have Active state. In the case you need to revert, you can edit the lead or move to other states through the state bar. Source Details – you may define more details where the lead came from.
c. Product Line – select product offerings where the lead is interested in.
d. Prospect's Request – select requests from the lead.
e. Level – lead level, e.g. cold, warm, hot
f. Can Receive Call – check the option if your lead contact can receive calls. Upon checking this, the primary phone will become a required field.
g. Can Receive Email – check the option if your lead contact can receive email. Upon checking this, the Email address will become a required field.
h. Stage – current stage of the lead.
i. Notes – additional notes you would like to enter regarding the lead.

3. Other Information:

a. Salutation – select the salutation appropriate for the lead contact.
b. Gender – gender of the lead contact
c. Primary Phone – select the contact preference of the lead.
d. Title – define the title or position of the lead contact e.g. CEO, Manager, Supervisor
e. Postal Address – postal address of the lead contact.
f. Zip/Postal Code – zip code where the lead contact's address is located.
g. Country – country where the lead is located.
h. Website – company website of the lead.
i. Moderated By – select one or more moderators to manage the lead details. Moderators can edit the lead such as change field values, add attachments, add or remove users in the access rights, etc. You're automatically assigned as the moderator of the lead item, but you can remove yourself if you feel you don't need to be the moderator which in that case you can no longer edit the lead details upon saving.
j. Owner – assign the user who needs to work on the lead, your name is selected by default.
k. Immediate Respondents – select the users that you need to respond to the lead immediately. Typing characters in the box will filter the list of the users that have access to the LM module. They will be notified of the updates made to the lead details.
l. Keywords – for easy searching or filtering on your lead, it is advisable to set values for this field.
m. Initiated by – select the user who initiated the lead item. In the case that the person doesn't have access to the module, you can have your name as the initiator which is selected by default. Upon saving the lead, this field cannot be modified.

3.2.   Add Lead Features and Functionalities
1. Attachment – you may attach files that are related to the lead. You are allowed to attach files up to a maximum size based on the maximum size subscribed by your company. You can use the drag and drop functionality in attaching the files.
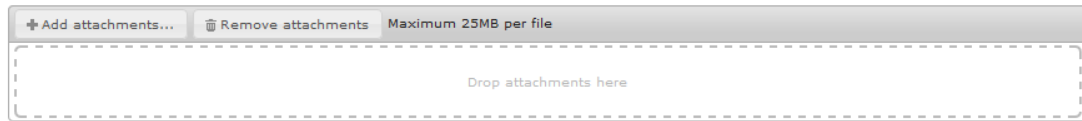
2. Access Rights – you may select other users to see your lead. Upon saving, the moderators, Initiator and Owner are automatically selected. In the event you removed your name in the access rights page and you're not selected as moderator, initiator or owner, you will not be able see the lead you have posted.
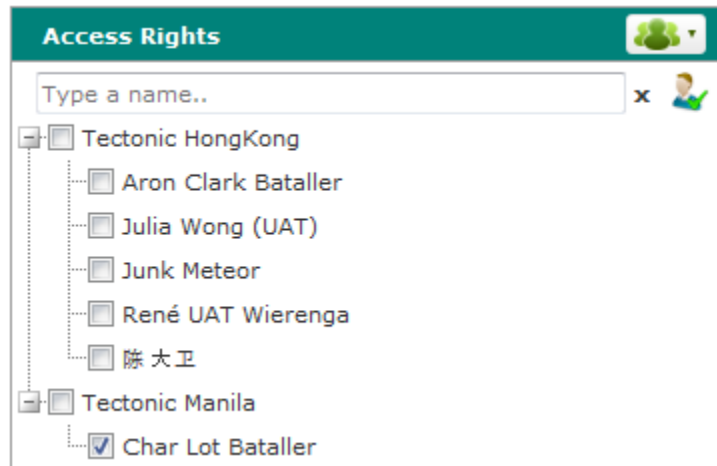
    a. User Group – you can select users under a user group through this functionality.

- Click the user group icon on the upper rightmost part of the Access Rights column.

- Default (company defined) and Customized (user defined) user groups will be shown.
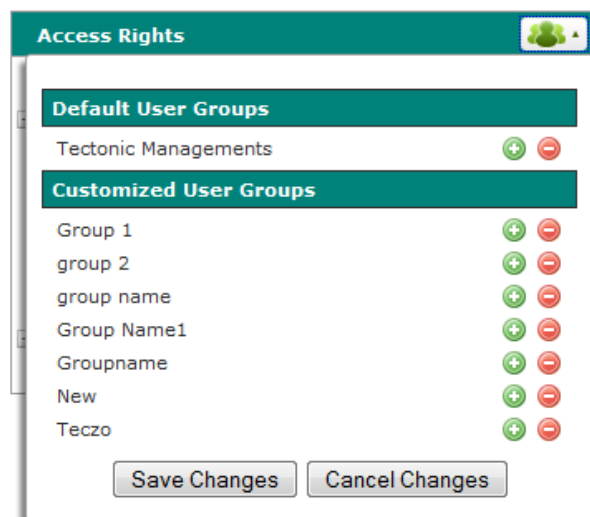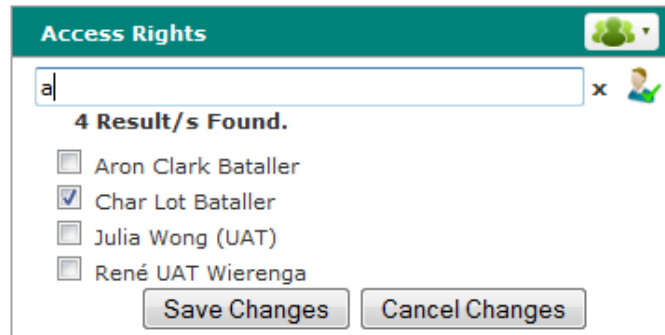
Tips: Hovering over the user group's name will show the names of the group members.
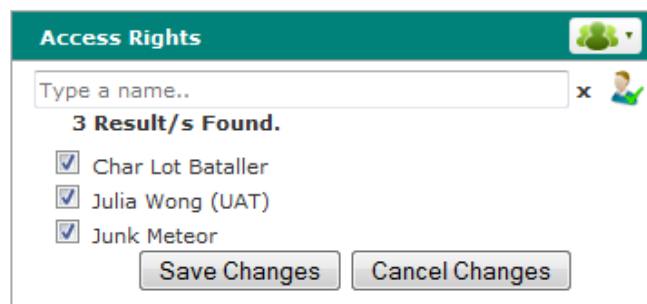
- Click the plus ⊕ icon to add the user group's members and negative ⊖ icon to remove the user group's members.
- Click the "Save Changes" button to add the members in the Access Rights list.

b. Type and Search – you can easily filter names from the list by using the type and search functionality.

c. Preview selected users – you can preview the names of already selected users by clicking the icon besides the type and search text box.
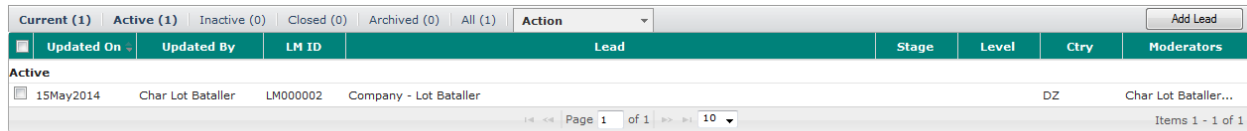

3. Fields highlighted in yellow are required fields. You need to fill in those fields to be able to save the lead successfully.
4. You have the following options to save or close the page:
   a. Save & New – save the lead and create a new one. You will be directed to the new Add page.
   b. Save & Close – save the new lead and return to the summary table.
   c. Back – return to summary page without saving or posting the lead.

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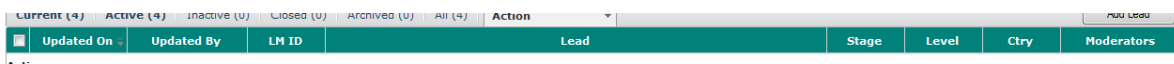## 4. Where can I see leads I have posted or I am included in?

The list of lead items posted by you or you have been given access to can be seen in the summary table. The summary table is located below the State Bar.

### 4.1. Summary Table Column Headers

1. Check All box –Upon checking the box, selects all the leads currently displayed in the summary table.
2. Updated On – indicates the date when the lead details were last updated. If you see a time, it means the lead was updated on the current date at that time.
3. Updated By – indicates the name of the last user who updated the lead by either updating the details or making a comment.
4. LM ID – a unique item identification of the lead.
5. Lead – indicates the company name and the display name of the lead.
6. Stage – current stage of the lead.
7. Level – current level of the lead.
8. Ctry – country where the lead is located.
9. Moderators – owner and moderators of the lead.

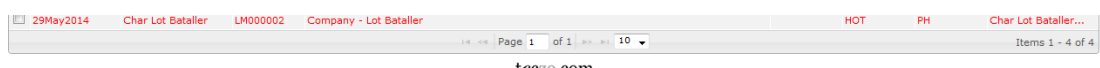### 4.2. Summary Table Features and Functionalities

1. Hovering over abbreviated values will show its description.

2. Hovering over the moderator's value will show the owner and moderators of the lead.
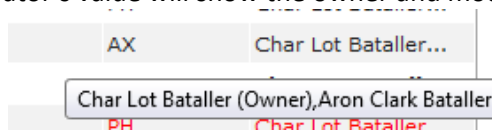
3. You can navigate to different pages through the paging feature below the summary table.
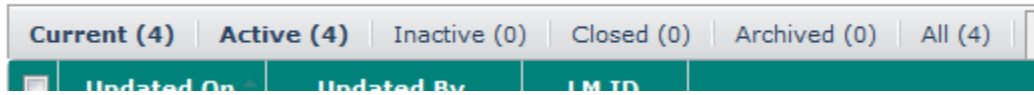
4. You can also go through different states through the state bar.

5. Clicking the lead item row will open the details page in the pane below.   Double clicking the row will open the details page in new tab.

5. What is the Details Page?

The Details Page contains the details of the selected lead. It consists of three sections, namely: the Details Column, the Comments Column and the Access Rights Tab.

Details	Edit
LM000002 - Company - Lot Bataller	

Tags

Immediate Respondents

Given Name:	Lot
Family Name:	Bataller
Middle Name:	
Phone (office 1):	+63 2 9128764
Phone (mobile):	+639276543278
Phone (home):	
Phone (office 2):	
Email Address:	lot@teczo.com
Fax (office):	+63 2 9123876

Lead Details

Source:	Events

Source Details

Lead got from APAC event in Singapore
Date: April 26, 2014

Product Line:	TECZO
Prospect's Request:	
Level:	Hot
Can Receive Call:	Yes
Can Receive Email:	Yes
Stage:	

Notes

Hot lead that is leading to opportunity.

Miscellaneous

Salutation:	Ms.
Gender:	Female
Primary Phone:	Phone (office 1)
Title:	Marketing Manager

Postal Address

Philippines

Zip/Postal Code:	1600
Country:	Philippines (PH)
Website:	http://www.teczo.com
Submitted By:	Char Lot Bataller
Submitted On:	15May2014 04:52 PM
Initiated By:	Char Lot Bataller
Updated By:	Char Lot Bataller
Updated On:	28May2014 04:04 PM
Closed By:	
Closed On:	
State:	Active

Keywords

Philippines

Owner:	Char Lot Bataller

Moderated By

Char Lot Bataller

Update History List

Attachments

No records found.

Archived Attachments

No records found.

Comments	Action Log	Related Topics	Add Comment

No comments posted.

Access Rights

5.1. Details Column

1. Lead Details – displays values selected or entered through the Add or Edit page. Additionally, it shows the following auto-generated fields:
   a. Submitted By – name of the user who submitted the lead item.
   b. Submitted On – date when the record was submitted.
   c. Updated By – name of the user who last updated the lead record.
   d. Updated On – date when the lead was last updated.
   e. Closed By – name of the user who moved the lead to the closed state.
   f. Closed On – date when the lead was moved to the closed state.
2. Edit Button - if you're the moderator or owner of the topic, you can see an Edit button in the upper part.
3. Attachments – you can see here different files attached to the topic. You can archive or remove attachments here if you have edit rights.
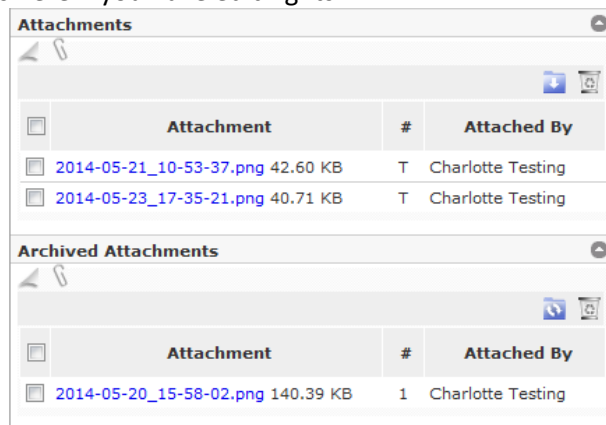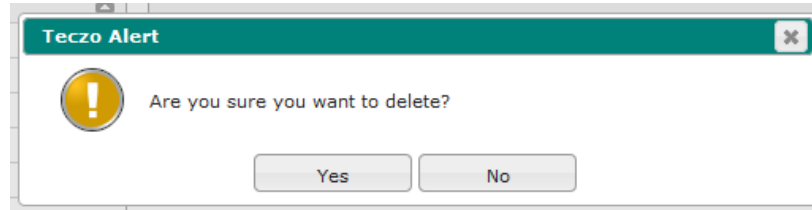

   a. Delete Attachment
      - Select one or more attachments to delete by clicking the checkbox in the first row.
      - After checking the attachments to delete, click the recycle bin icon to delete the selected attachments.
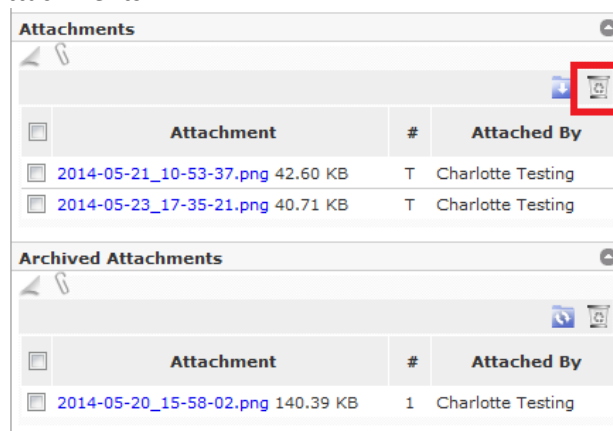
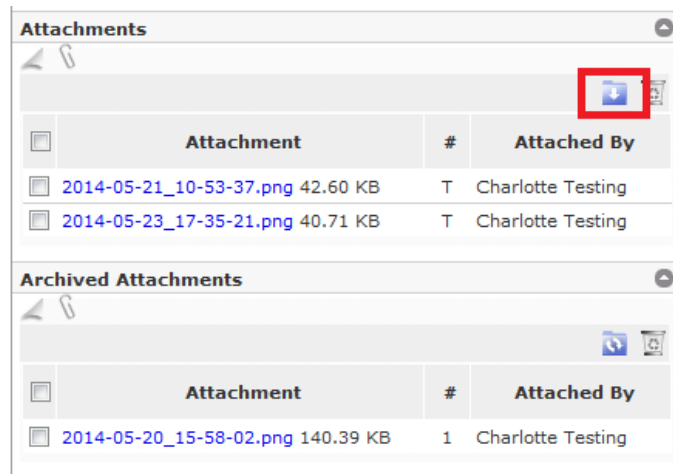   - Confirm by clicking the "Yes" button in the alert message.

b. Archive Attachment
- Select one or more attachments to archive by clicking the checkbox in the first row.
- After checking the attachments to archive, click the archive icon to move the selected attachments.

- You can restore archived attachments by selecting the attachment from the archived table by clicking the checkbox in the first row. Then click the restore attachment icon.
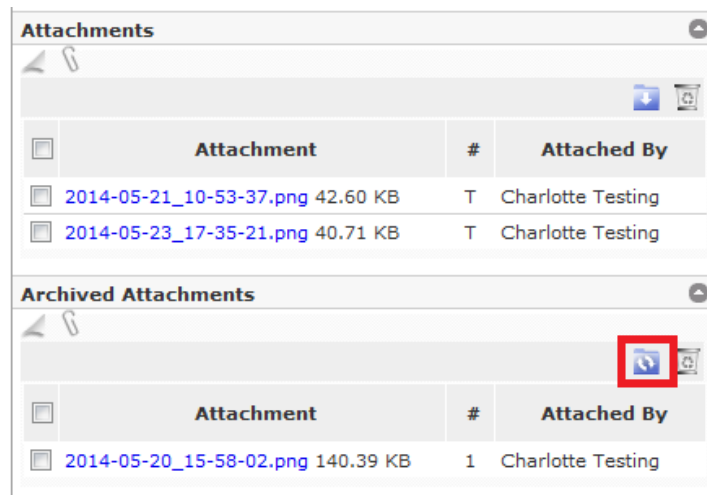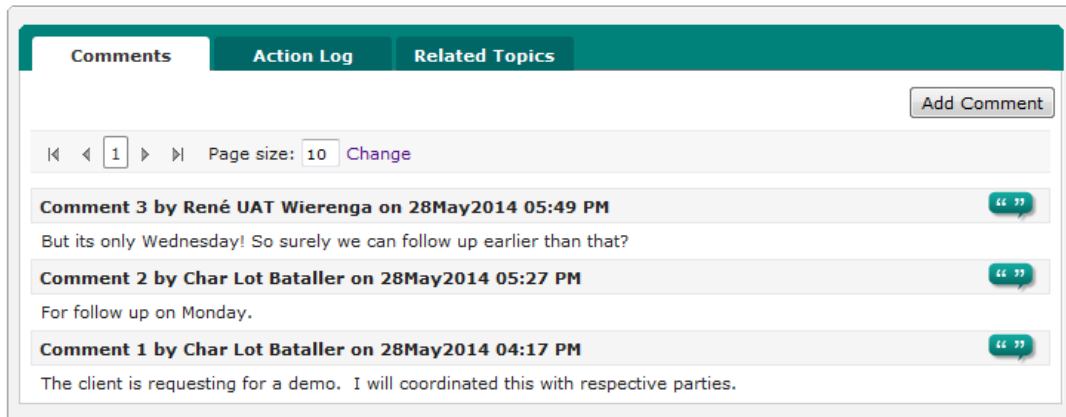

4. Update History List – all updates or changes made in the lead details are recorded in the update history list; for example adding or removing users, updating field values, attaching and removing files. To view, click the Update History List link located before the attachments.
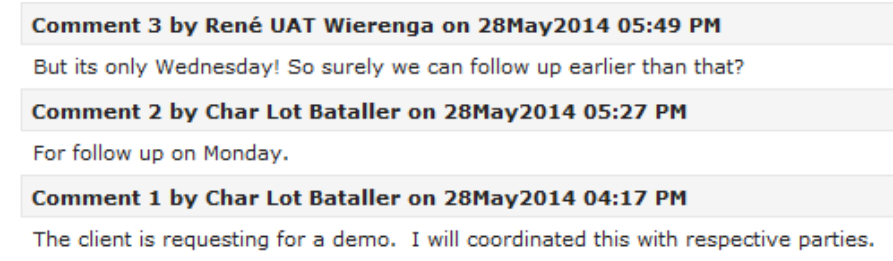
5.2.   Comments Column

Comment column includes three tabs:

1. Comment Tab
    a. Shows all the comments posted for the lead.
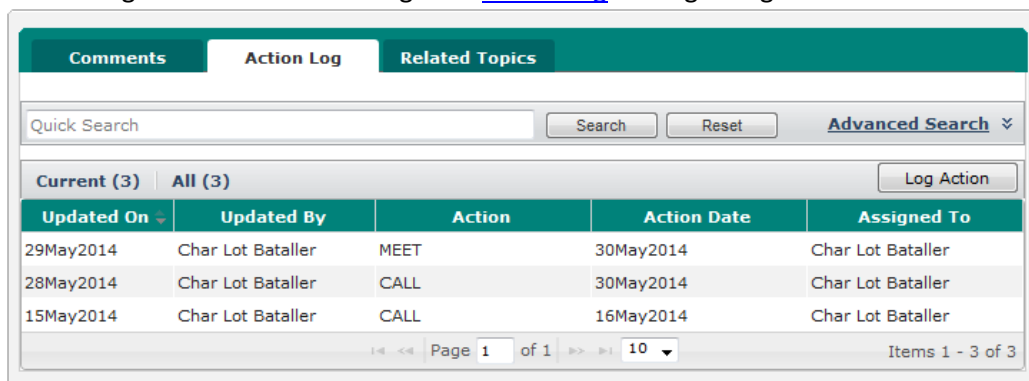

    b. You can Add Comment or Quote a comment.

2. Action Log Tab
    You can log a certain action through the Action Log tab regarding the lead.
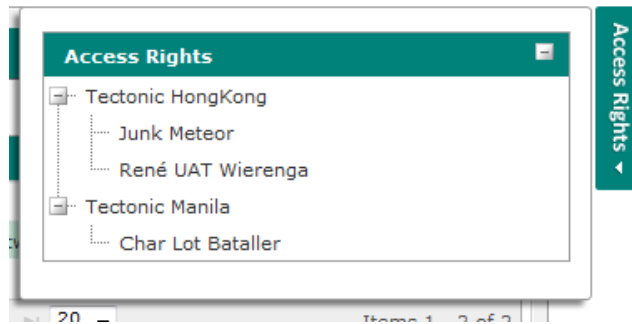

3. Related Topics
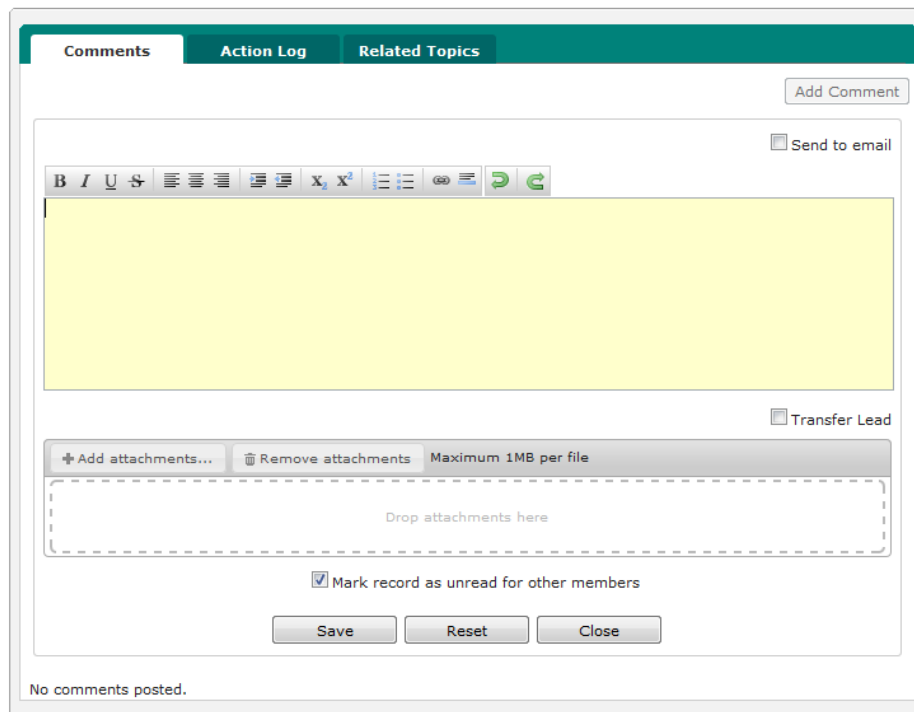   You can link items that are related to the lead through the Related Topics tab.

5.3. Access Rights Tab

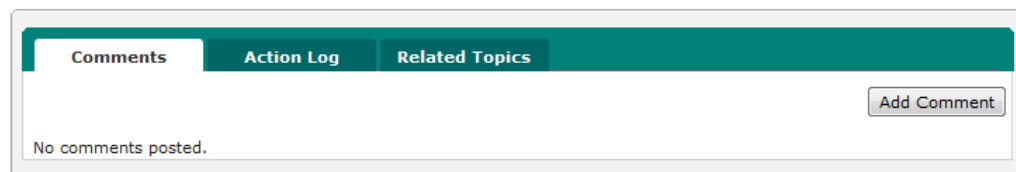All users that have access to the lead item are listed. Click the tab to show the names.

6. How can I post or quote a comment?

If you have questions or there is something you want to discuss about the lead, you can post or quote a comment to a lead item.
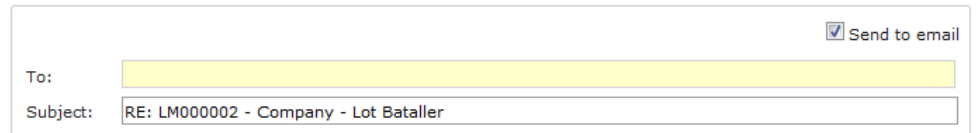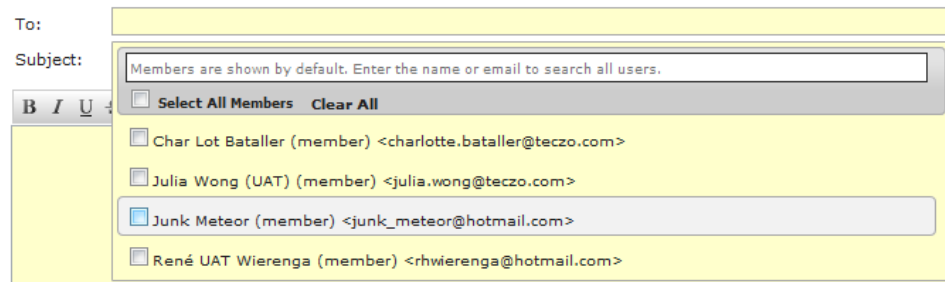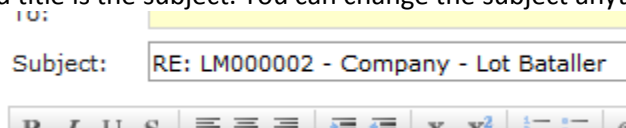

6.1. Add a comment

1. In the comment column you can see the "Add Comment" button. Clicking the button will open a comment box.
2. You can use the available editor to format your comment.
3. You can also send your comment to other users by checking the option to send to email.
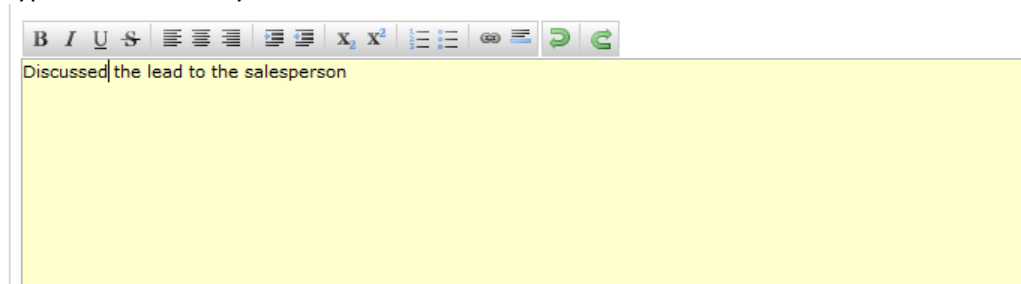
   a. You can type and search the name of the users you want to include as recipient. By default the lead topic members are shown in the selection upon clicking the recipient box.

   b. By default the lead title is the subject. You can change the subject anytime.

   c. Type the comment you want to store and send.

4. You can attach files with the maximum size subscribed by your company. If you're not a moderator or owner, you can only remove the attachments that you've posted. Adding and removing attachments will be recorded in the update history list.

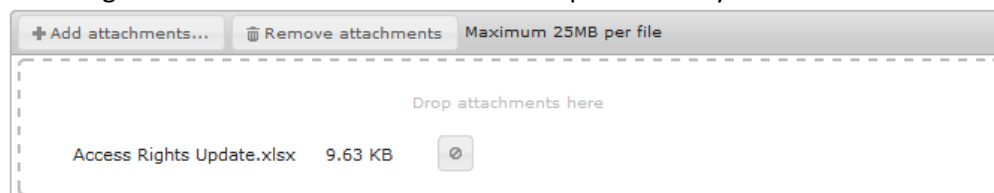5. You have the option to save the comment and making the lead record Read or Unread to other members by checking or un-checking the option.

☑ Mark record as unread for other members

6. Saving the comment successfully will show the lead depending on the selected option for other members in the summary table.   Updated by and updated on will be changed respectively.

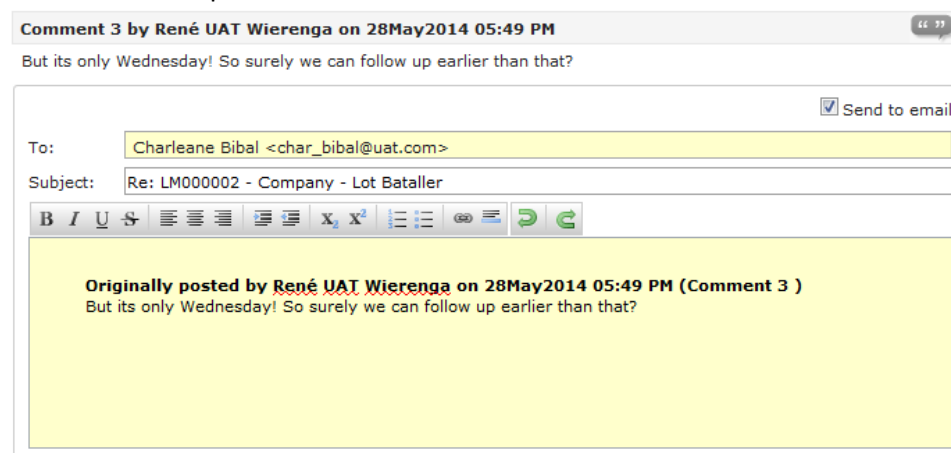**6.2.   Quote a comment**
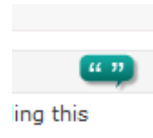
1. You can use this feature to quote a certain comment by clicking the quote icon.
2. The quoted comment will be included in the comment box which you can change before clicking Save.
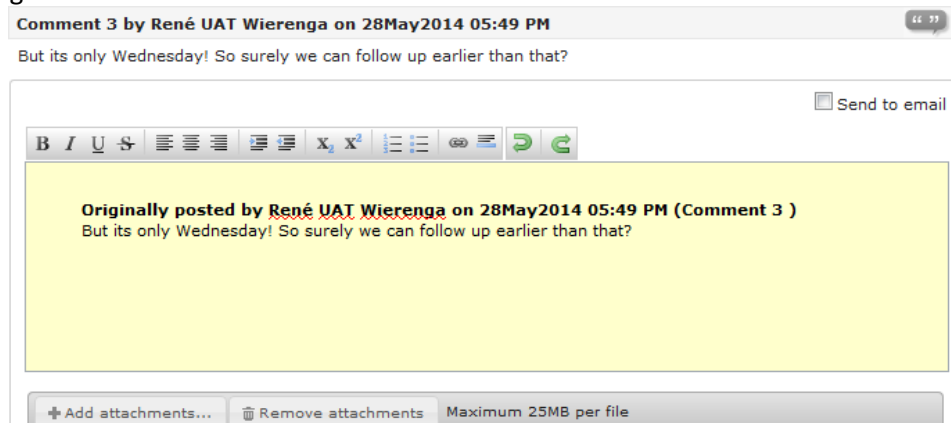
3. You can also send the quoted comment to email.

4. Upon saving successfully, it will be posted as a new comment for the item and the summary table will be updated just like adding a comment.

6.3.   Edit a Comment

1. You can use this feature to edit a certain comment by clicking the edit icon beside the quote icon. It is only possible to edit the last posted comment of the topic and provided that you are the last user that posted it.
2. You have the option to send the comment to email as well, just like adding a new comment.

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7. How can I edit a lead item?
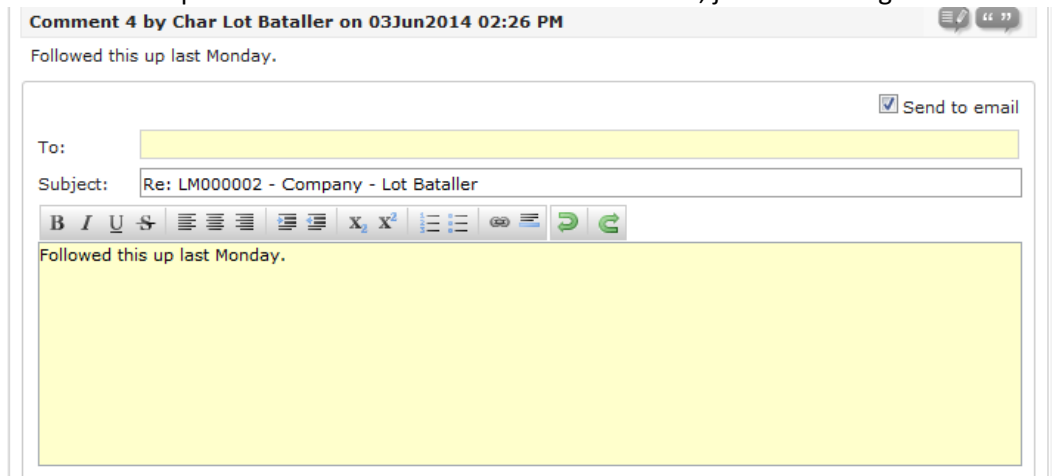
Users with edit rights to the lead, Owner, Moderators and Module Administrators, are the only ones allowed to edit. If you're one of those, you can see an edit button through the header of the record details column.

1. Clicking the "Edit" button will direct you to the Edit page. The fields are the same as the Add page.
2. In the Edit page, the State field is already enabled. You can move your lead to On-Hold, Closed or Archived state. Choosing Closed will prompt you to enter closing remarks. Upon saving, the closing remarks will be posted as a new comment on the details page.
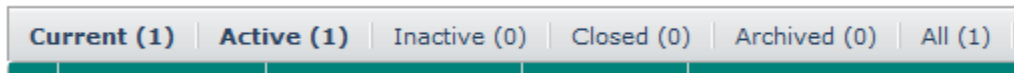
8. What is the State Bar?

The State Bar is located below the Search feature in the summary page and consists of the following: State Headers, Actions Dropdown and Add Lead button.

| Current (1) | Active (1) | Inactive (0) | Closed (0) | Archived (0) | All (1) | Action ▾ | | Add Lead |

8.1. State Headers

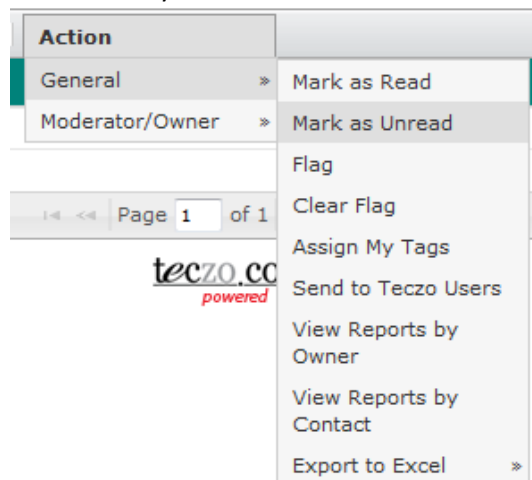| Current (1) | Active (1) | Inactive (0) | Closed (0) | Archived (0) | All (1) |

1. Leads are grouped into different states such as Active, Inactive, Closed, Archived and All. You can click the state headers to filter the items in the summary table aside from filtering through the Advanced Search.
2. Numbers beside the state name reflects the following:
   a. Current (#) – number of leads currently displayed or filtered in the summary list.
   b. Active (#) – number of leads with Active state.
   c. Inactive (#) – number of leads with Inactive state.
   d. Closed (#) – number of leads with Closed state.
   e. Archived (#) – number of leads with Archived state.
   f. All (#) – number of all leads in different states, i.e. Active, Inactive, Closed and Archived. Clicking the "All" tab will show all leads separated per state in the summary list.

8.2. Action Dropdown

Provides a dropdown list of different actions that can be applied to module items. Select one or more leads from the list by checking the box in the first column of the summary table then select the desired action.

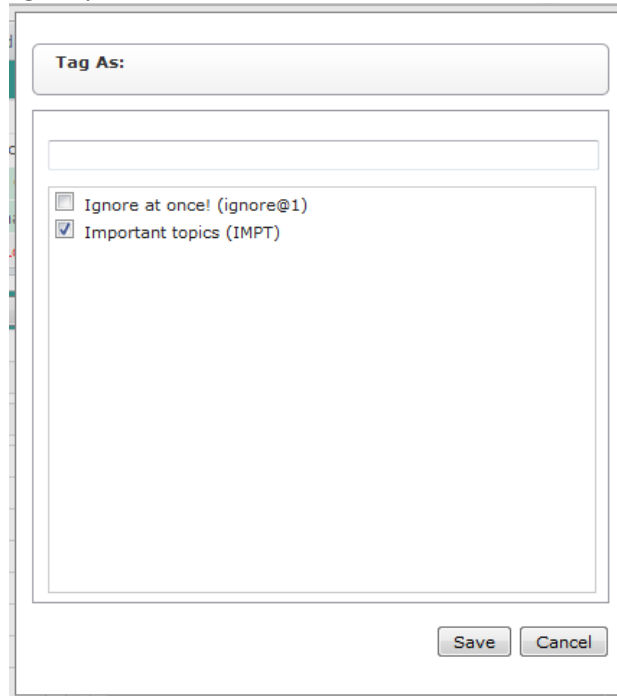1. General - can be applied in all leads you have access to

Action	
General »	Mark as Read
Moderator/Owner »	Mark as Unread
	Flag
Page 1 of 1	Clear Flag
	Assign My Tags
teczo.co powered	Send to Teczo Users
	View Reports by Owner
	View Reports by Contact
	Export to Excel »

   a. Mark As Read – leads marked as Read will have the rows not displayed in bold.
   b. Mark as Unread – leads marked as Unread will have the rows displayed in bold.
   c. Flag – flagged leads will have the rows displayed in red. This action helps to remind users of important items they need to follow up on.
   d. Clear Flag – non-flagged leads have the rows displayed in black. Choosing this action reverts the status of items from flagged to non-flagged.
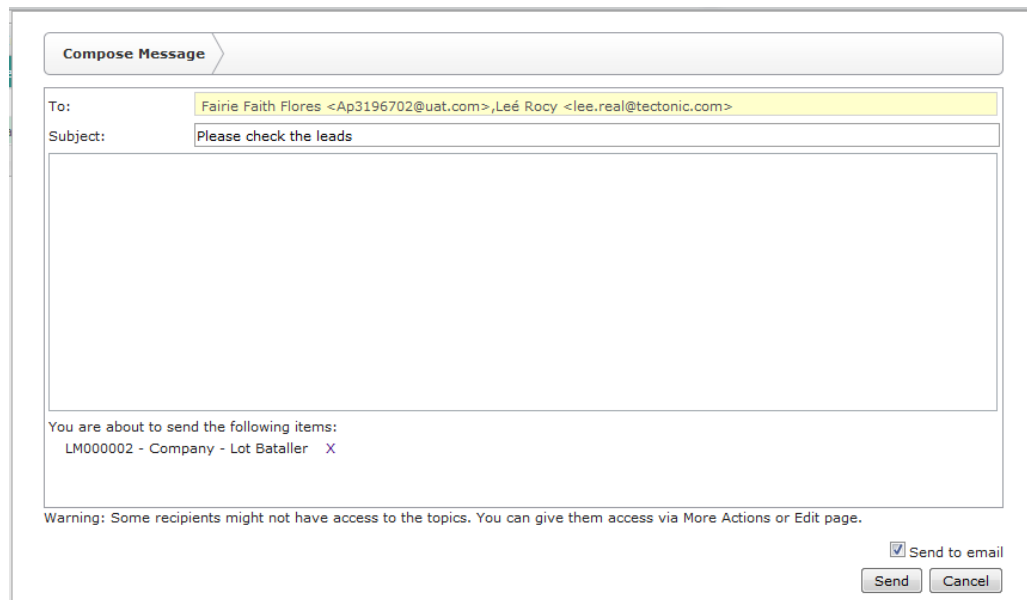
e. Assign My Tags – you can assign your personal tags in the lead items. You can define personal tags through My Account.

f. Send to Teczo Users – you can send one or more leads to other users in their messaging box and email.

- Select the Send to Teczo Users link in the dropdown selection.

- Select users though type and search functionality, enter a subject and compose your message.
- The message will automatically be sent to their messaging box which includes the links of the leads you've selected.

- If you check the Send to Email checkbox, the message will also be sent to the recipient's email.
- Click "Send" button to send the message.
  Note that in the event that one or more of the recipients do not have access to the leads linked to the message, they will be prompted with a "Access Denied" message upon clicking the lead link.

g. View Reports by Owner – clicking this will direct you to a new page where you can see generated reports of the lead you have access to which is grouped by Owner. (See <u>How to Use Action Log?</u>

The Action Log is a module feature where the users can see and manage the actions necessary for the selected lead.

8.3. Viewing the Action Logs

1. Through the Comment section of the details page click the Action Log tab to open.

2. You have the following options in viewing the logged actions:

a. Filter the list through the Quick Search or the Advanced Search.

b. Summary table where the list of the logged actions are displayed.

The numbers above the summary table indicate the following:

- Current – number of action log records currently filtered.
- All – number of all action log records for the Lead.

c. To view the details of the log, double click the record to open the log details.

- The following fields are shown on the log details page:

  - Action – action for the lead e.g. meeting, email, call etc.
  - Type – type of action for the lead e.g. inbound, outbound etc.
  - Assigned to – person assigned to do the action. User assigned can also edit the action log if he/she is not the owner and moderator of the lead.
  - Contact details – contact used in doing the action.
  - Action Date and Time – date and time the action is to be done.
  - Priority – priority of the assigned action.
  - Updated By – the user who updated the action, initially the submitter of the action.
  - Updated On – the date when the action is updated, initially the date it was submitted.
  - Action Notes – taken notes about the action.
  - Update History List – link to see the list of changes about the logged action. Clicking this will open a new window.

  - Attachments – files attached that are related to the logged action.
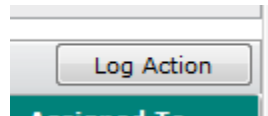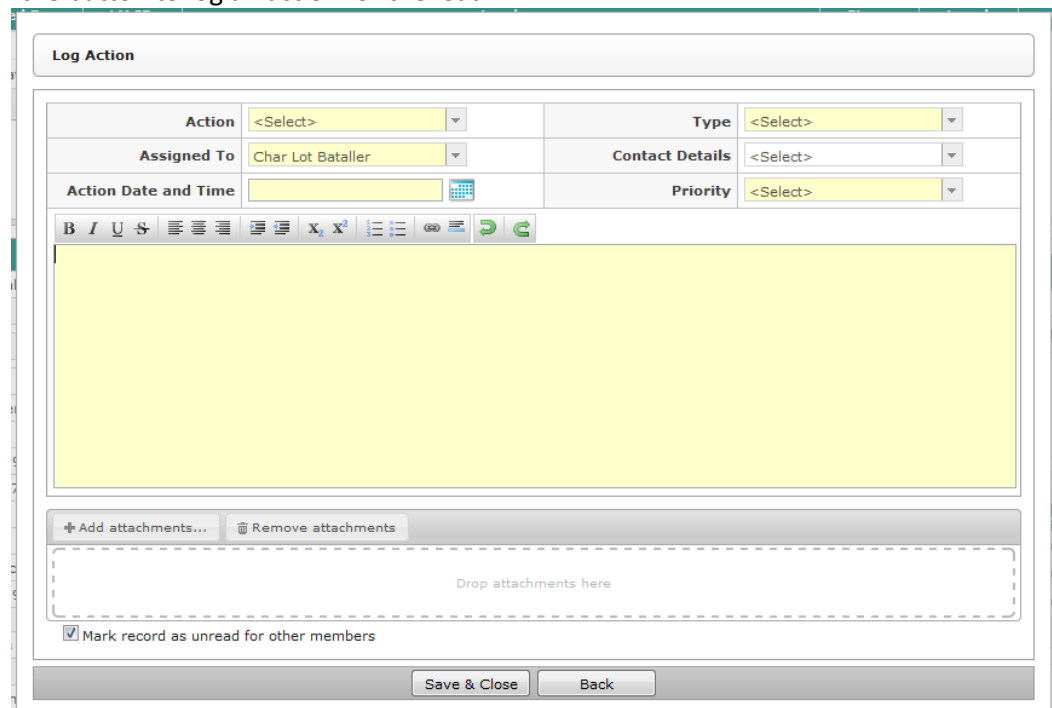
- Edit Button – Owner, Moderator and Assigned user can edit the details. Click this button to see the edit page which shows the same fields as the Log Action details page.

8.4. Logging Actions

1. Owner and Moderators of the Lead can log actions through the tab. The "Log Action" button is available and enabled to them.

2. Click the button to log an action for the lead.

3. Fill in the following details:
   a. Action – select the action for the lead. Available values are defined through the Data Maintenance Module. In case you need to add values in the field, you must contact your system administrator.
   b. Type – select the type appropriate for the action. Available values are defined through the Data Maintenance Module. In case you need to add values in the field, you must contact your system administrator.
   c. Assigned To – list of users with access to the LM module can be assigned. They will automatically have access to the Lead in case they are not added initially. They will also have rights to edit the logged action like writing some notes etc.
   d. Contact Details – select the contact details that will be used for the action.
   e. Action Date and Time – enter a date and time where the action is to be done.
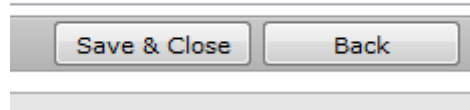   f. Priority – select priority of the action.

g. Notes – enter notes that are necessary for the action.

h. Attachments – attach one or more files that are needed for the action.

4. You have the option to make the lead record unread to other members by checking the option.
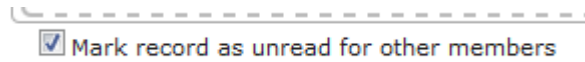
5. Click the "Save & Close" button to save the log. Clicking Back will not log the action and close the add page.
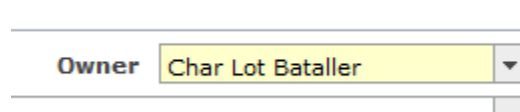

9.   How can I transfer a Lead?

A Lead that is considered an opportunity can be transferred to the appropriate person so they can handle and convert the opportunity to a good sale. The Owner and Moderator of the lead can transfer through the following methods:

9.1.   Transfer the Lead through an Edit page

1. Open the edit page of the lead details and locate the Owner field.

2. Select the appropriate sales person in the Owner field.

3. The lead Transfer Comment field will be shown below which you are required to fill in. The message will be posted as the latest comment for the lead.
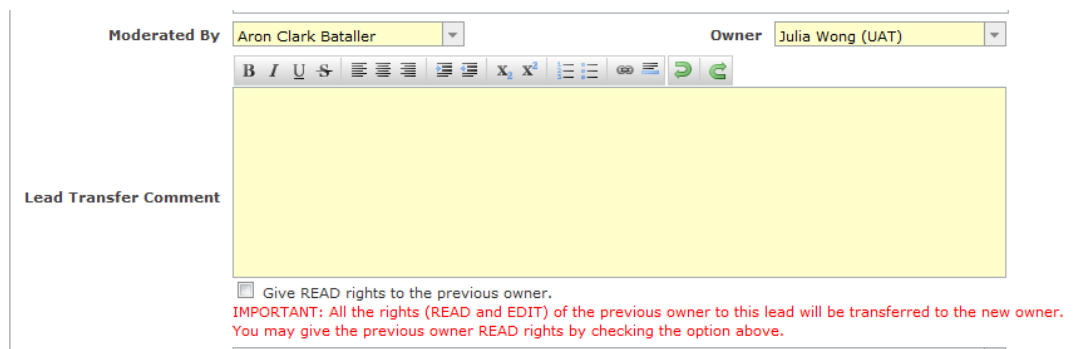
4. Transferring a lead to another person will remove all the access rights of the previous owner (EDIT and READ). To give READ access, check the option below the Lead Transfer Comment.
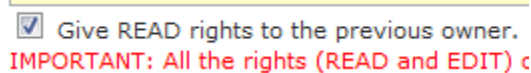
5. Save the lead to apply the changes.

Lead Management Module
Quick Guide

9.2. **Transfer the Lead through the Comment Page**

1. Open the Add Comment page.

2. Tick the checkbox below the text field.

3. The Owner field selection will be shown.

4. Transferring a lead to another person will remove all the access rights of the previous owner (EDIT and READ). To give READ access, check the option below the Lead Transfer Comment.

5. Write the transfer comment and save the comment to apply the changes. The message will be posted as the latest comment for the lead.

9.3. Transferring Multiple Leads through the Action Dropdown

6. Select one or more leads you want to transfer in the summary table.

7. Select the Transfer Lead option under Action > Moderator/Owner.

8. You will be prompted with Step 1 – Notice with the summary of leads you can transfer.

9. Click Next to select new owner, Step 2 – Select User, by clicking the name from the left table. Only one owner can be selected. If you wish to change your selection, click the name from the right and choose another name.

10. Transferring a lead to another person will remove all the access rights of the previous owner (EDIT and READ). To give READ access, check the option below the Lead Transfer Comment.

11. Click Next to write a transfer comment. The message will be posted as the latest comment for the lead.

12. Click Save to apply the changes.

    h.   How to View Lead Reports?)

    i.   View Reports by Contact – clicking this will direct you to a new page where you can see generated reports of the lead you have access to which is grouped by Contact. (See How to Use Action Log?

The Action Log is a module feature where the users can see and manage the actions necessary for the selected lead.

9.4.   Viewing the Action Logs

    3.   Through the Comment section of the details page click the Action Log tab to open.

    4.   You have the following options in viewing the logged actions:

        d.   Filter the list through the Quick Search or the Advanced Search.

e. Summary table where the list of the logged actions are displayed.

The numbers above the summary table indicate the following:
- Current – number of action log records currently filtered.
- All – number of all action log records for the Lead.

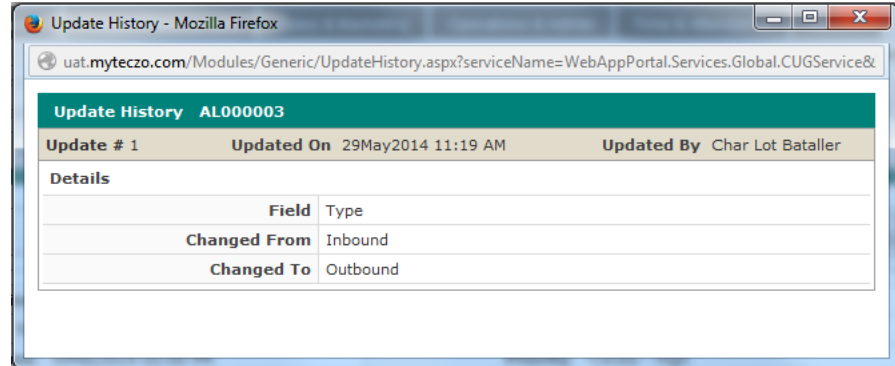f. To view the details of the log, double click the record to open the log details.

- The following fields are shown on the log details page:
  - Action – action for the lead e.g. meeting, email, call etc.
  - Type – type of action for the lead e.g. inbound, outbound etc.
  - Assigned to – person assigned to do the action. User assigned can also edit the action log if he/she is not the owner and moderator of the lead.
  - Contact details – contact used in doing the action.
  - Action Date and Time – date and time the action is to be done.
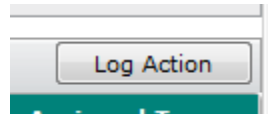 - Priority – priority of the assigned action.

- Updated By – the user who updated the action, initially the submitter of the action.
- Updated On – the date when the action is updated, initially the date it was submitted.
- Action Notes – taken notes about the action.
- Update History List – link to see the list of changes about the logged action. Clicking this will open a new window.

- Attachments – files attached that are related to the logged action.
- Edit Button – Owner, Moderator and Assigned user can edit the details. Click this button to see the edit page which shows the same fields as the Log Action details page.

9.5. Logging Actions

6. Owner and Moderators of the Lead can log actions through the tab. The "Log Action" button is available and enabled to them.

7. Click the button to log an action for the lead.

8. Fill in the following details:
   i. Action – select the action for the lead. Available values are defined through the Data Maintenance Module. In case you need to add values in the field, you must contact your system administrator.
   j. Type – select the type appropriate for the action. Available values are defined through the Data Maintenance Module. In case you need to add values in the field, you must contact your system administrator.
   k. Assigned To – list of users with access to the LM module can be assigned. They will automatically have access to the Lead in case they are not added initially. They will also have rights to edit the logged action like writing some notes etc.
   l. Contact Details – select the contact details that will be used for the action.
   m. Action Date and Time – enter a date and time where the action is to be done.
   n. Priority – select priority of the action.
   o. Notes – enter notes that are necessary for the action.
   p. Attachments – attach one or more files that are needed for the action.

9. You have the option to make the lead record unread to other members by checking the option.
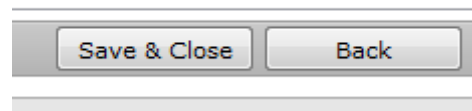
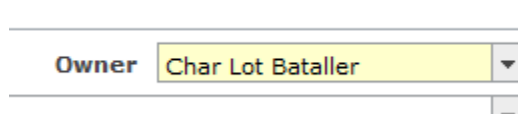10. Click the "Save & Close" button to save the log. Clicking Back will not log the action and close the add page.

10. How can I transfer a Lead?

A Lead that is considered an opportunity can be transferred to the appropriate person so they can handle and convert the opportunity to a good sale. The Owner and Moderator of the lead can transfer through the following methods:
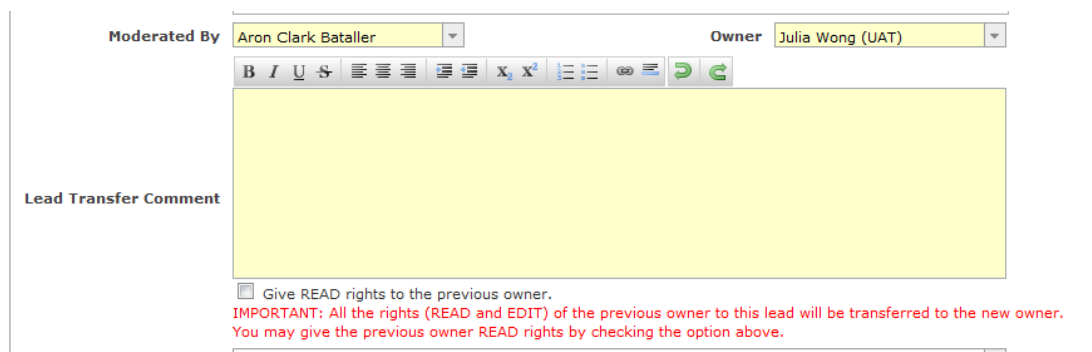
10.1. Transfer the Lead through an Edit page

6. Open the edit page of the lead details and locate the Owner field.

7. Select the appropriate sales person in the Owner field.
8. The lead Transfer Comment field will be shown below which you are required to fill in. The message will be posted as the latest comment for the lead.

9. Transferring a lead to another person will remove all the access rights of the previous owner (EDIT and READ). To give READ access, check the option below the Lead Transfer Comment.

10. Save the lead to apply the changes.

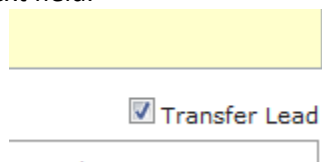### 10.2. Transfer the Lead through the Comment Page

13. Open the Add Comment page.
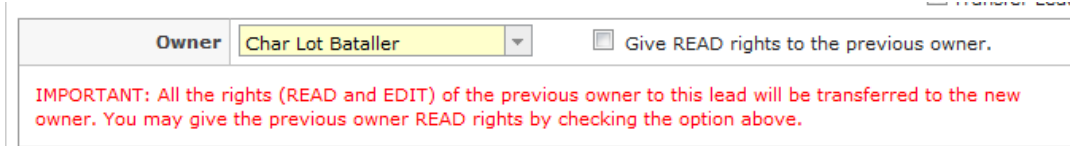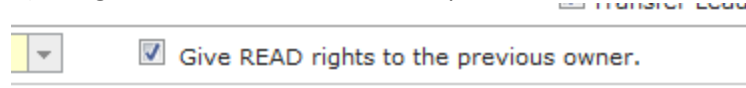
14. Tick the checkbox below the text field.

15. The Owner field selection will be shown.

16. Transferring a lead to another person will remove all the access rights of the previous owner (EDIT and READ). To give READ access, check the option below the Lead Transfer Comment.

17. Write the transfer comment and save the comment to apply the changes. The message will be posted as the latest comment for the lead.
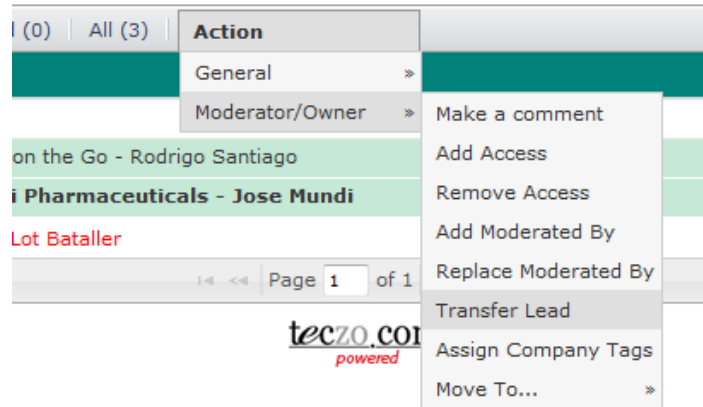
10.3. Transferring Multiple Leads through the Action Dropdown

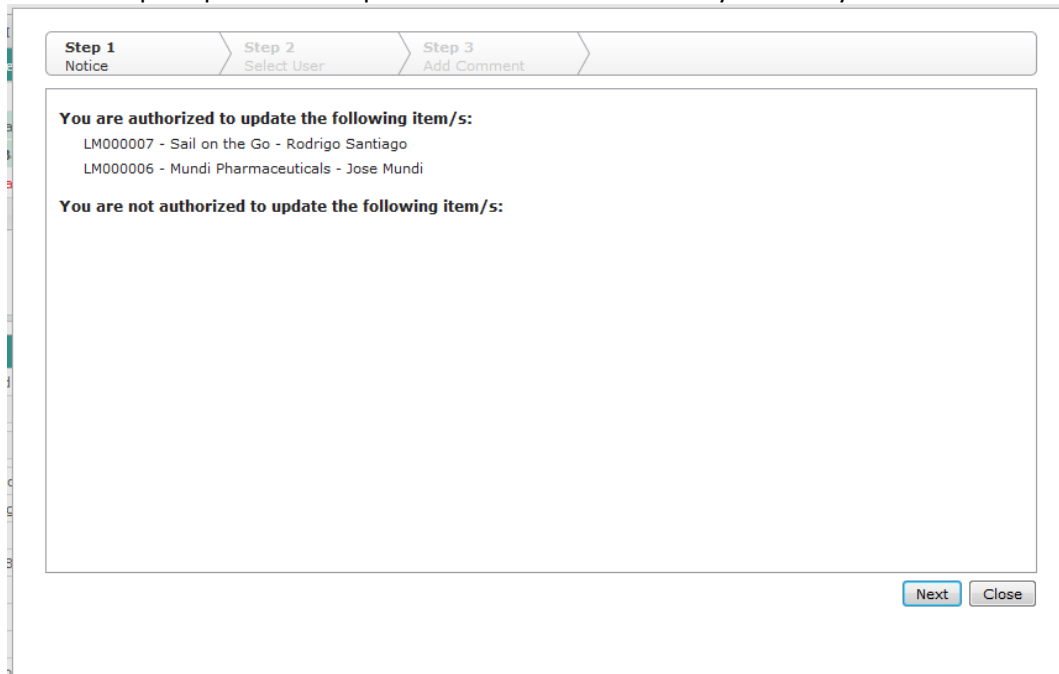18. Select one or more leads you want to transfer in the summary table.

19. Select the Transfer Lead option under Action > Moderator/Owner.

20. You will be prompted with Step 1 – Notice with the summary of leads you can transfer.

21. Click Next to select new owner, Step 2 – Select User, by clicking the name from the left table. Only one owner can be selected. If you wish to change your selection, click the name from the right and choose another name.
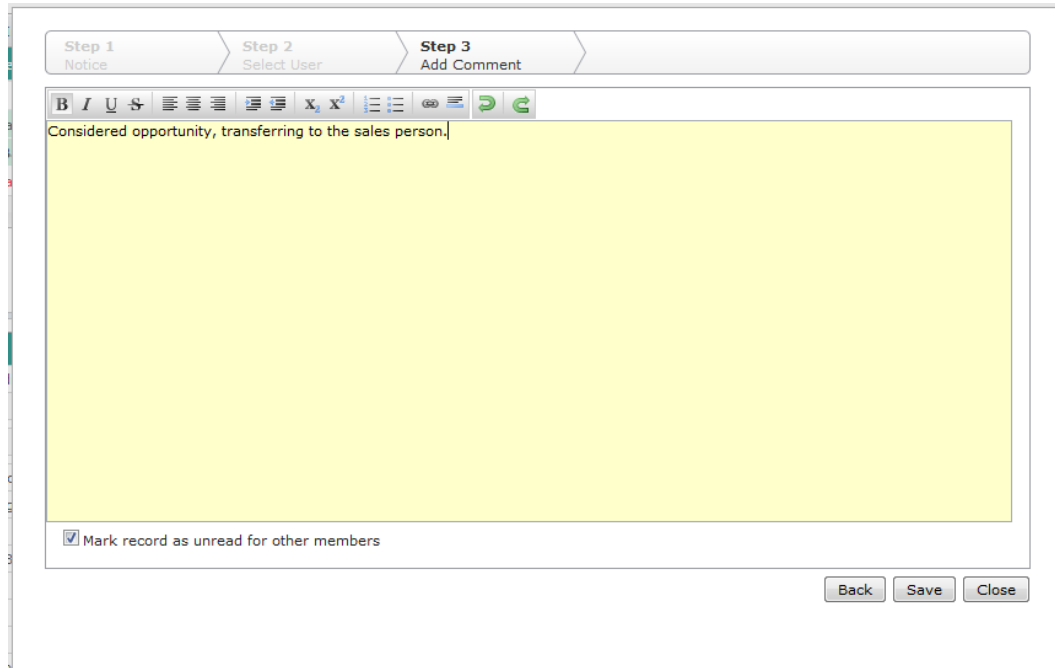
22. Transferring a lead to another person will remove all the access rights of the previous owner (EDIT and READ). To give READ access, check the option below the Lead Transfer Comment.

23. Click Next to write a transfer comment. The message will be posted as the latest comment for the lead.

24. Click Save to apply the changes.

    j.   How to View Lead Reports?)

    k.   Export to Excel – you may use export to excel if you need to have copies of the leads you have access to. Simply select the Export to Excel link in the Action dropdown selection. You have the following options to export to excel:

- Export All – export all leads you have access to including their details.
- Export Selected – exports all the leads checked in summary page including their details.

2. Moderator/Owner – actions that can be used by the Moderator, Owner or Module Administrator.
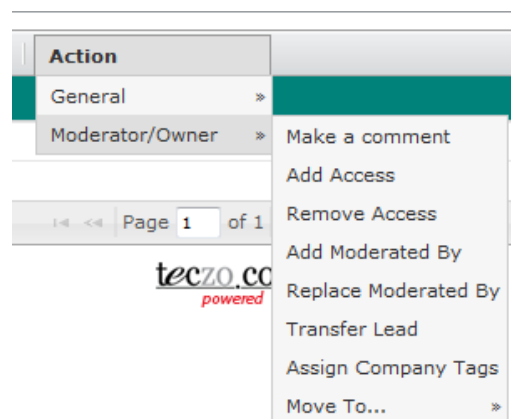
    a.   Make a comment – allows you to make a comment to one or more leads.

- You will receive a prompt showing the list of items to which you have edit rights, Step 1 - Notice.

- After clicking the "Next" button, you will be directed to the Step 2 – Add a comment where you can compose your message.


- You have the option to mark the record as unread for other members. Enabling this will make the record unread or bold in the LM summary table of other members of the lead upon saving.
- Click "Save" to post the comment, "Back" to return to Step 1 – Notice, "Close" to return to the LM summary table without posting your comment.
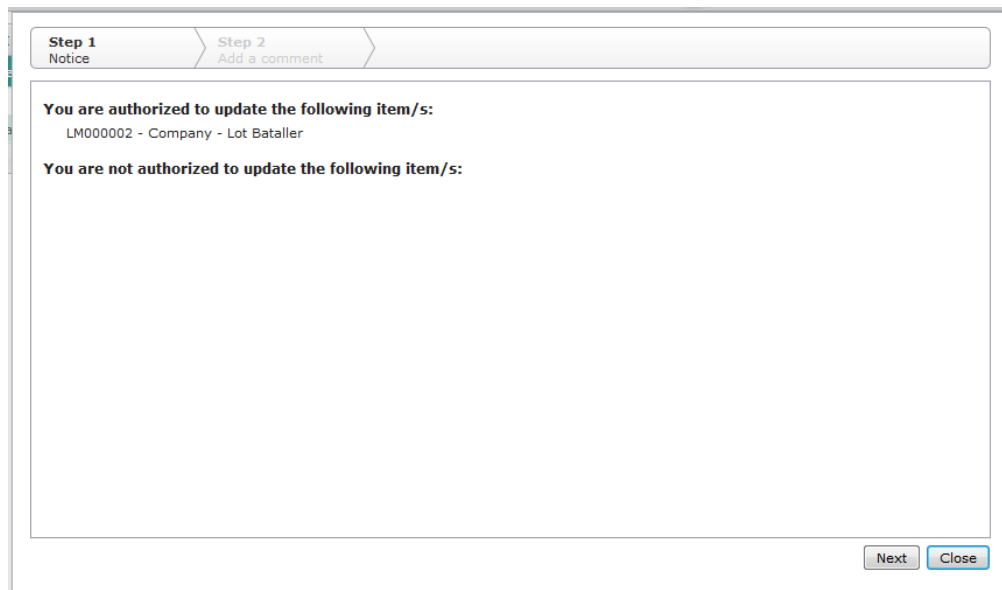
b. Add or Remove Access – allows you to add or remove access rights to one or more leads.

- Upon selecting the item/s, you can choose to either Add or Remove Access to such items.
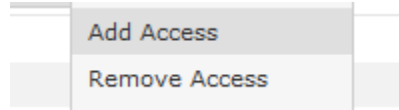

- Upon clicking either the Add or Remove Access from the dropdown list, you will receive a prompt showing the list of items to which you have edit rights Step 1 – Notice.

- After clicking the "Next" button, you will be provided with a list of all users with access to the LM module The list of all users appears on the left side, while the list of selected users appears on the right side. You can choose to add or remove access for one or more users. You can also click the name of the selected users in the right side to remove them from the list of users to be given or denied access. You can filter the list by typing characters in the search box.
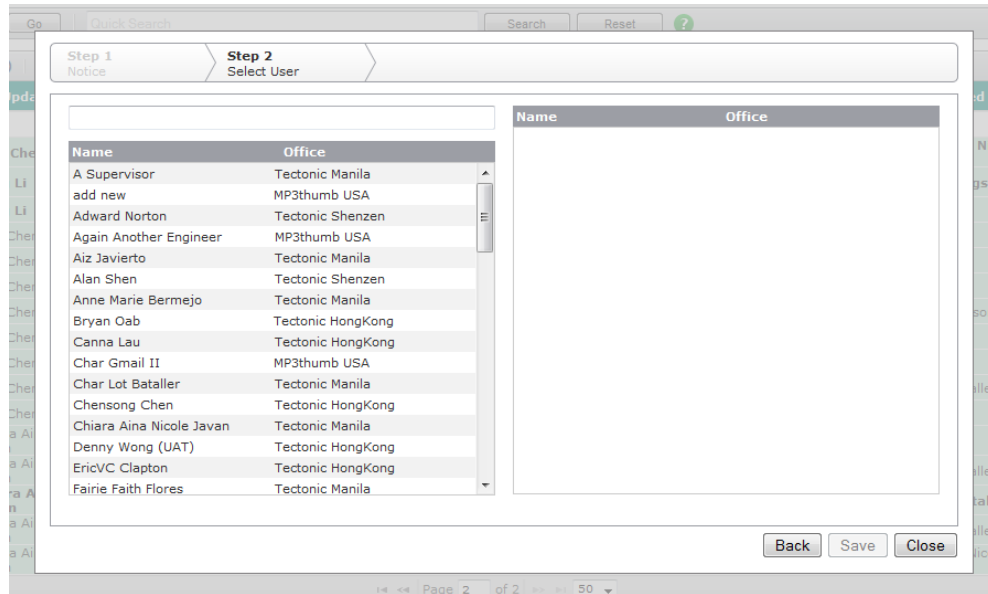
- Click "Save" to add or remove access of the selected users, "Back" to return to Step 1 – Notice, or "Close" to return to the LM summary table without making any change.

c. Change Assigned Fields – instead of opening the edit page of each item, you can use this action which provides you to change following:
- Add Moderated By – add one or more moderators of the selected lead items.
- Replace Moderated By – replace all currently selected moderators.

d. Assign Company Tags – you can assign company tags to the one or more leads. Company tags are defined by the system administrator.

e. Move To… – This allows users to easily move one or more leads to other states, either Active, Inactive, Closed or Archived. Choosing the Closed state will prompt you to enter closing remarks.
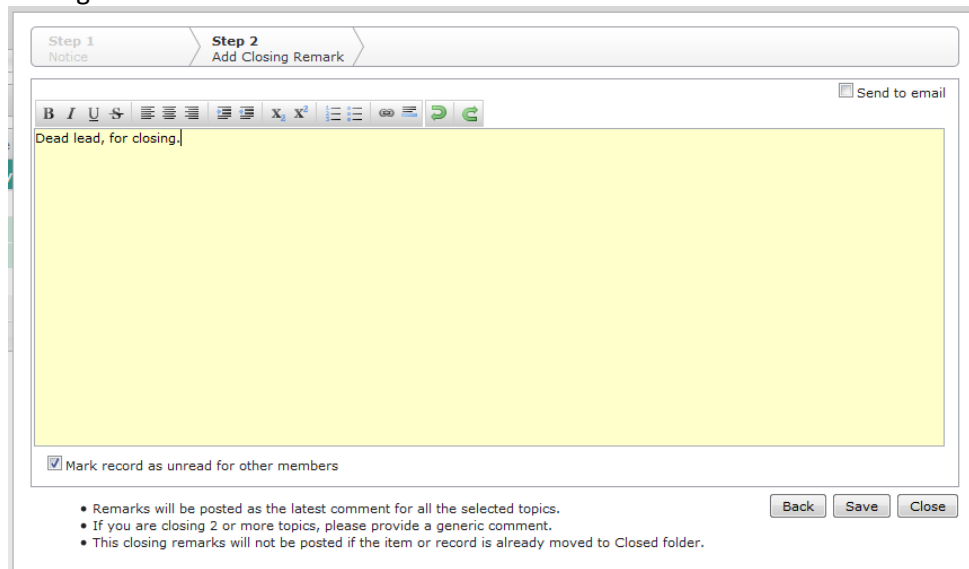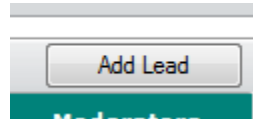

Tip: Provide generic remarks or comments if you're selecting more than one item.

10.4.   Add Lead button

This is the link where you can add a lead. If you don't see this button, it means you don't have Add rights to the module. You may contact the System Administrator in order to get Add / Edit rights to the LM module.


11. How can I filter the list of lead items?

The Search/ Filter bar is where you can search certain keywords or use certain fields to filter the list in the summary table. It consist of two parts: Basic Search and Advanced Search
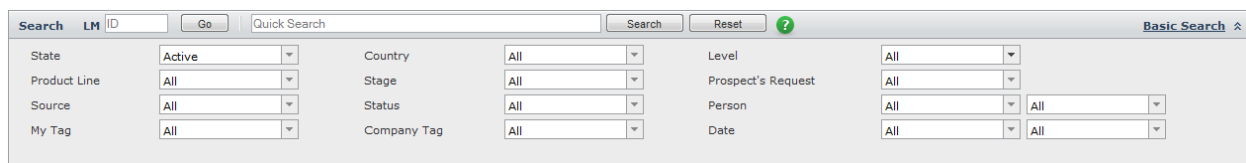

11.1.   Basic Search

1. Direct Search – you can enter the LM ID of a certain lead and see its details right away. Pressing Enter or Clicking the "Go" button will filter the list.
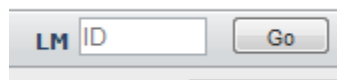
2. Quick Search – you can enter keywords in the search box and click the "Search" button to filter the summary list. This functionality searches basic fields such as ID, Display Name, Company Name, Description and Keywords. By default, it only searches the lead items in the Open state. You can return the summary list to its default view by clicking the "Reset" button.
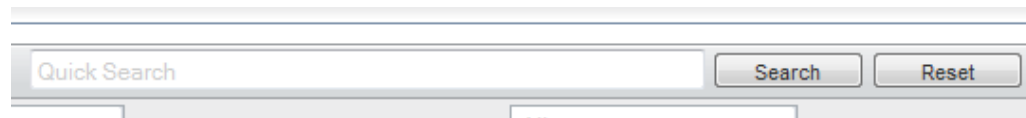
11.2.   Advanced Search

1. You can refine your searching through the Advanced Search. The list can be filtered using different fields such as State, Country, Level, Product Line, Stage, Prospect's Request, Source, Status, Person, My Tag, Company Tag and Date.   Click the Advanced Search link in the top right side of the of the Basic Search row to see the available fields.
2. Simply select the desired field values and click the "Search" button. You are allowed to select multiple values per field.
3. You can return the summary list to its default values by clicking the "Reset" button.

12. How to Use Action Log?

The Action Log is a module feature where the users can see and manage the actions necessary for the selected lead.

12.1. Viewing the Action Logs

5. Through the Comment section of the details page click the Action Log tab to open.

6. You have the following options in viewing the logged actions:

g. Filter the list through the Quick Search or the Advanced Search.

h. Summary table where the list of the logged actions are displayed.

The numbers above the summary table indicate the following:
- Current – number of action log records currently filtered.
- All – number of all action log records for the Lead.

i. To view the details of the log, double click the record to open the log details.

- The following fields are shown on the log details page:

  - Action – action for the lead e.g. meeting, email, call etc.
  - Type – type of action for the lead e.g. inbound, outbound etc.
  - Assigned to – person assigned to do the action. User assigned can also edit the action log if he/she is not the owner and moderator of the lead.
  - Contact details – contact used in doing the action.
  - Action Date and Time – date and time the action is to be done.
  - Priority – priority of the assigned action.
  - Updated By – the user who updated the action, initially the submitter of the action.
  - Updated On – the date when the action is updated, initially the date it was submitted.
  - Action Notes – taken notes about the action.
  - Update History List – link to see the list of changes about the logged action. Clicking this will open a new window.
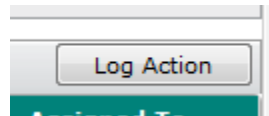

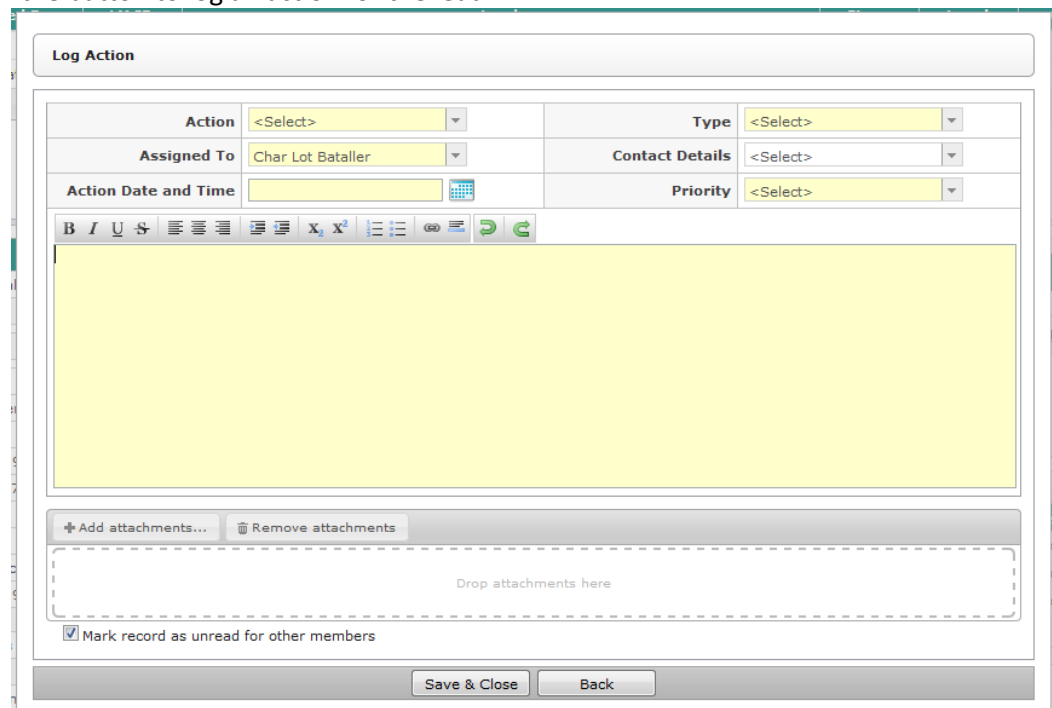 - Attachments – files attached that are related to the logged action.

▪ Edit Button – Owner, Moderator and Assigned user can edit the details. Click this button to see the edit page which shows the same fields as the Log Action details page.

12.2.   Logging Actions

11. Owner and Moderators of the Lead can log actions through the tab. The "Log Action" button is available and enabled to them.

12. Click the button to log an action for the lead.

13. Fill in the following details:
   q. Action – select the action for the lead. Available values are defined through the Data Maintenance Module. In case you need to add values in the field, you must contact your system administrator.
   r. Type – select the type appropriate for the action. Available values are defined through the Data Maintenance Module. In case you need to add values in the field, you must contact your system administrator.
   s. Assigned To – list of users with access to the LM module can be assigned. They will automatically have access to the Lead in case they are not added initially. They will also have rights to edit the logged action like writing some notes etc.
   t. Contact Details – select the contact details that will be used for the action.
   u. Action Date and Time – enter a date and time where the action is to be done.
   v. Priority – select priority of the action.

w.   Notes – enter notes that are necessary for the action.
x.   Attachments – attach one or more files that are needed for the action.

14. You have the option to make the lead record unread to other members by checking the option.

☑ Mark record as unread for other members
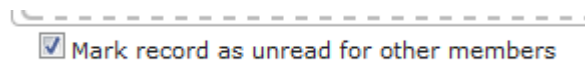
15. Click the "Save & Close" button to save the log. Clicking Back will not log the action and close the add page.

Save & Close   Back
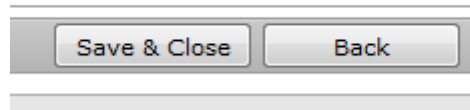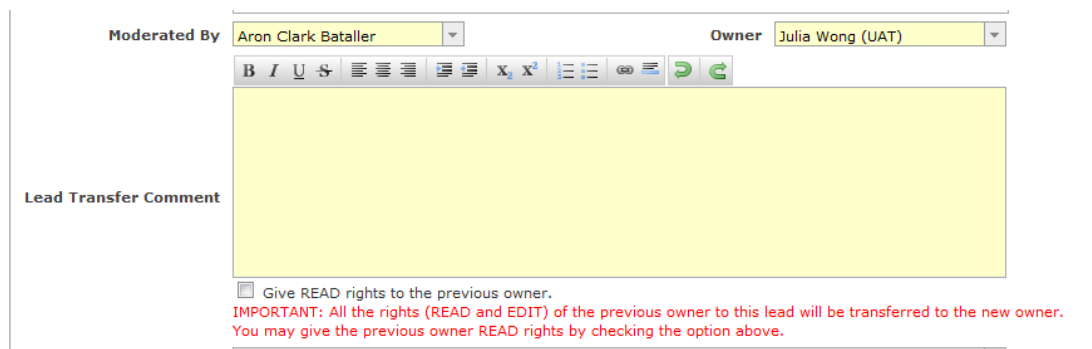
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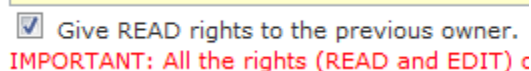
13.1.   Transfer the Lead through an Edit page

11. Open the edit page of the lead details and locate the Owner field.

Owner   Char Lot Bataller   ▼
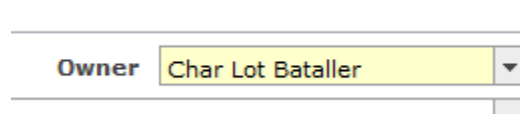
12. Select the appropriate sales person in the Owner field.
13. The lead Transfer Comment field will be shown below which you are required to fill in. The message will be posted as the latest comment for the lead.

Moderated By   Aron Clark Bataller   ▼   Owner   Julia Wong (UAT)   ▼

B *I* U S̶   ☰ ☰ ☰   ☲ ☲   x₁ x²   ☷ ☷   ⚭ ≡   ⤳ ⤵

Lead Transfer Comment

☐ Give READ rights to the previous owner.
IMPORTANT: All the rights (READ and EDIT) of the previous owner to this lead will be transferred to the new owner.
You may give the previous owner READ rights by checking the option above.

14. Transferring a lead to another person will remove all the access rights of the previous owner (EDIT and READ). To give READ access, check the option below the Lead Transfer Comment.

☑ Give READ rights to the previous owner.
IMPORTANT: All the rights (READ and EDIT) o

15. Save the lead to apply the changes.

13.2.   Transfer the Lead through the Comment Page

25. Open the Add Comment page.

26. Tick the checkbox below the text field.

27. The Owner field selection will be shown.

28. Transferring a lead to another person will remove all the access rights of the previous owner (EDIT and READ). To give READ access, check the option below the Lead Transfer Comment.

29. Write the transfer comment and save the comment to apply the changes. The message will be posted as the latest comment for the lead.
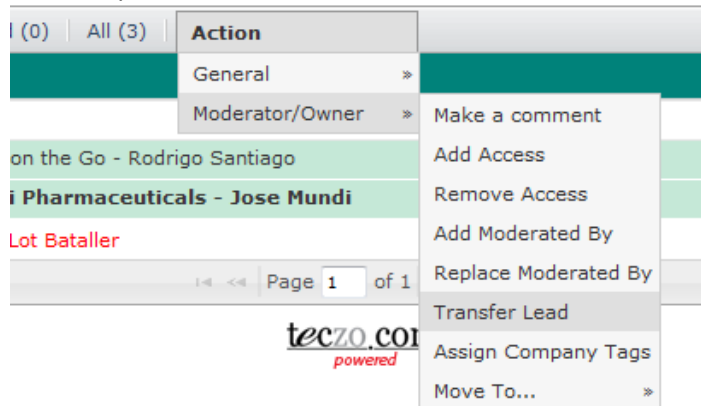
13.3. **Transferring Multiple Leads through the Action Dropdown**

30. Select one or more leads you want to transfer in the summary table.

31. Select the Transfer Lead option under Action > Moderator/Owner.

32. You will be prompted with Step 1 – Notice with the summary of leads you can transfer.

33. Click Next to select new owner, Step 2 – Select User, by clicking the name from the left table. Only one owner can be selected. If you wish to change your selection, click the name from the right and choose another name.

34. Transferring a lead to another person will remove all the access rights of the previous owner (EDIT and READ). To give READ access, check the option below the Lead Transfer Comment.

35. Click Next to write a transfer comment. The message will be posted as the latest comment for the lead.

36. Click Save to apply the changes.

14. How to View Lead Reports?

Lead reports can be viewed in two ways through the Action dropdown: By Owner and By Contacts.

14.1. View Reports By Owner

37. Through the State bar > Action > General Dropdown selection, click the View Reports By Owner.

38. A new tab page will be opened showing all the leads you have access to, grouped by the Lead Owner.

39. You have the following options to manage the report:
    a. Search and Filter - to search the list using basic and advanced search

    b. Export to Excel – you have the option to export the report through excel.

c. View Summary – summary where tally of records is shown either by Level or State in a new page tab.

BY LEVEL

Lead Management Owner Report
(By Level)

Display Name	No Level	1000 Celcius!	Cold	Hot	Luke Warm	Meh
Tectonic Manila						
Char Lot Bataller	0	0	0	1	0	0

BY STATE

Lead Management Owner Report
(By State)

Owner	Active	Inactive	Closed	Archived	Transferred
Tectonic Manila					
Char Lot Bataller	1	0	0	0	0
				Total Opportunity:	0

3. Expand and collapse the list – expand and collapse to see the lists grouped by owner through clicking the +/- icons.
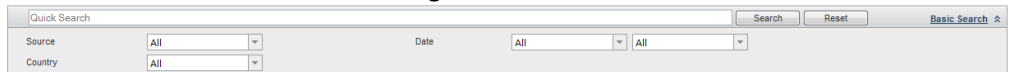

14.2. View Reports By Contacts

1. Through the State bar > Action > General Dropdown selection, click the View Reports By Contacts.
2. A new tab page will be opened showing all the leads you have access to, grouped by Contacts.
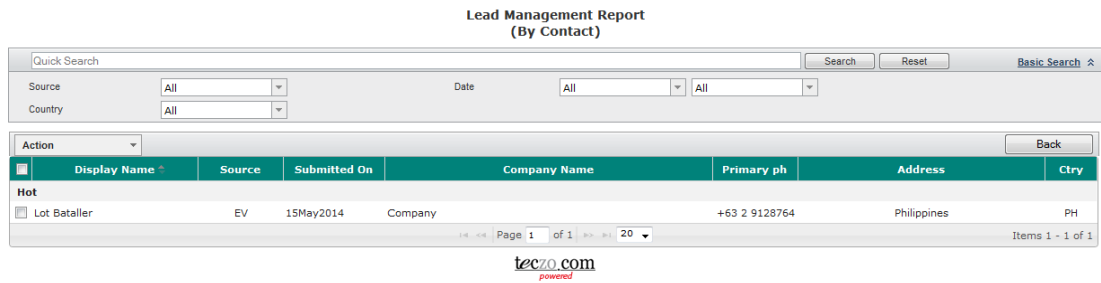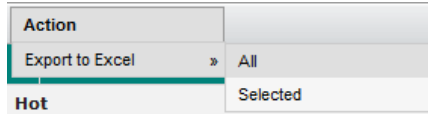
3. You have the following options to manage the report:
   a. Search and Filter - to search the list using basic and advanced search

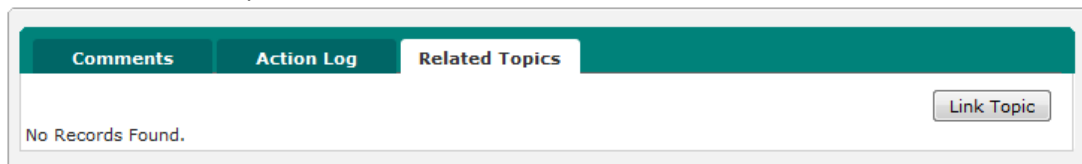   b. Export to Excel – you have the option to export the report through excel.
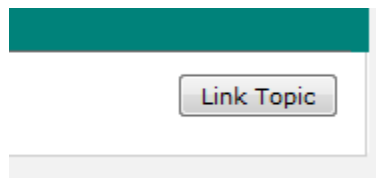

15. How to link topics to the lead?

Users with edit rights to the lead can link (Owner, Moderator or Module Administrator) one or more related topics to the lead.

15.1. Link topics from other modules

1. Go to the Related Topics tab in the comment column.

2. Click the "Link Topic" button to open the modal page which shows different steps in linking the topic.
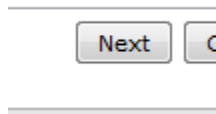
3. In Step 1 – Select Module modal page, select a module where the related topic is located. You will see all modules that you have right to access.

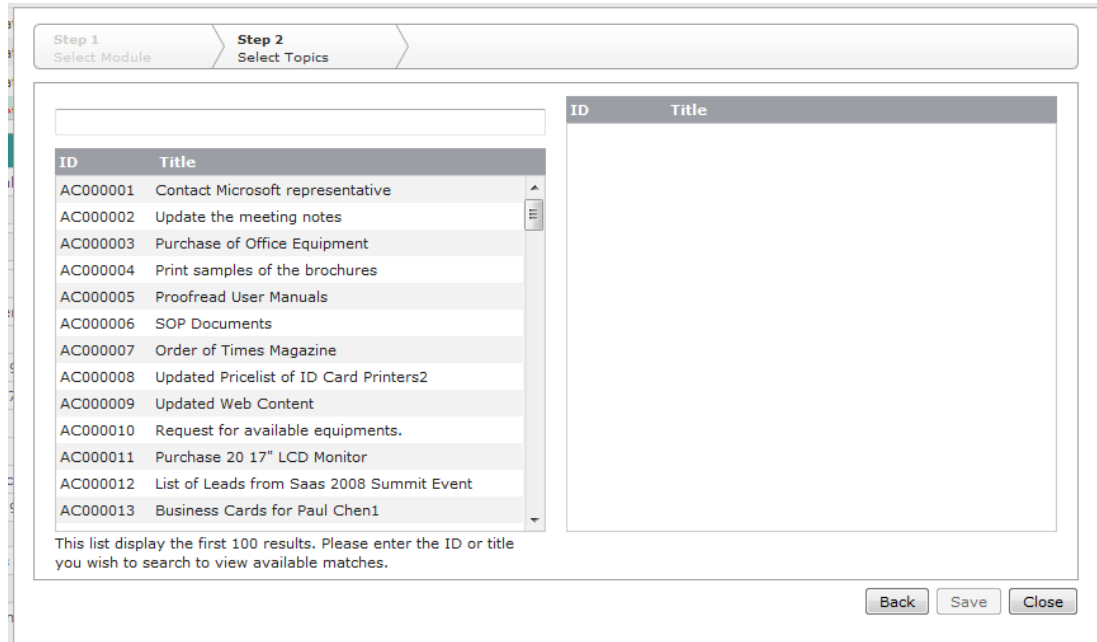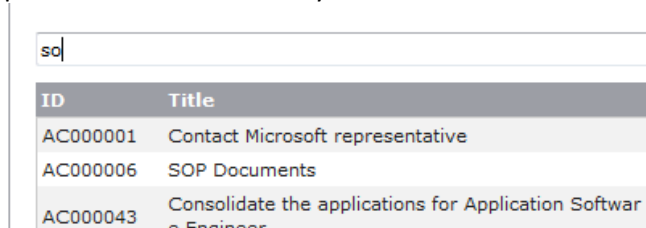4. Click the "Next" button to go to the next step.

5. In Step 2 – Select Topics modal page, select the related topics from the left table selection. All the topics you have access to in the selected module will be available.
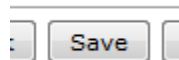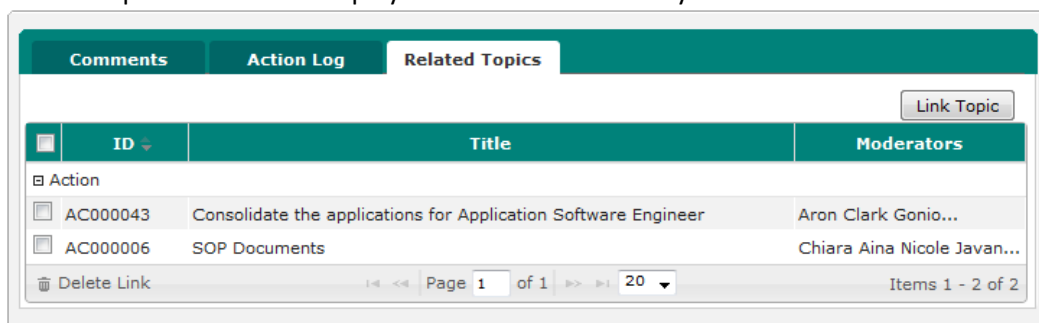
You can use the type and search functionality to filter the list.
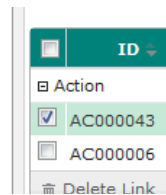

6. Click the "Save" button to link the topics.

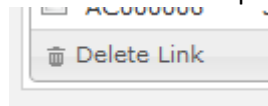7. Related topics will now be displayed in the tab's summary table.
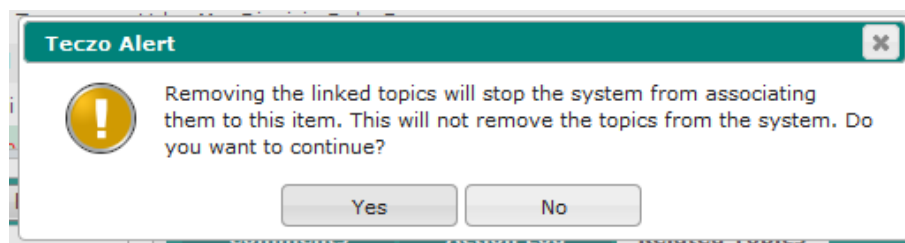
15.2. Removing linked topics

1. Select one or more related topics to be removed by checking the box in the first column of the row.

2. Click the "Delete Link" button on the leftmost bottom part of the table.

3. Confirm the action by clicking the "Yes" button in the alert message.

16. What are the record indicators in the summary table?

Notification icons or indicators are designed so that individual users can quickly see what the record updates are. For example, if I am not interested in any access rights changes to a certain lead, I can just ignore it. Similarly, if I am interested in people's comments, I can choose to view leads where there have been new comments added.

When an item is updated, you will see Notification Icon(s) displayed in from the Lead title column.

	Updated On	Updated By	AC ID	Action Title	Dept	%Cmp	P	Owner	Moderated By	Latest Deadline
Open										
	09Nov2012	Rose Purugganan	AC000688	New One		90	L	Rose Purugganan	Rose Purugganan	
	08Nov2012	Rich Delavin	AC000686	2 wing			H	Mark QA Francisco	Mark QA Francisco	
	07Nov2012	Rich Delavin	AC000565	3 Testing Action via Automated Testing using save button xxxx	PPM		NEXT	Rich Delavin	Rich Delavin...	28Jun2012
	06Nov2012	Charlotte Bataller	AC000684	test 2			L	Charlotte Bataller	Charlotte Bataller	13Nov2012
	06Nov2012	Charlotte Bataller	AC000683	Test Project			M	Charlotte Bataller	Charlotte Bataller	07Nov2012
	31Oct2012	Mark QA Francisco	AC000259	test			M	Richard Delavin (acs)	Richard Delavin (acs)	
	30Oct2012	Rose Purugganan	AC000675	2 ffsa	ENG2		M	Mark QA Francisco	Mark QA Francisco	
	29Oct2012	Module Admin Rose Purugganan	AC000678	123			H	Charlotte Bataller	Bryan Oab	
	25Oct2012	Mark QA Francisco	AC000606	4 Action Titles Save and Close			L	Rose Purugganan	Rose Purugganan	
	24Oct2012	Rose Purugganan	AC000674	sdfd	SM	20	M	Rose Purugganan	Rose Purugganan	

Definitions of Notifications Icons

Icon	Meaning	Icon disappears
	The item is marked as sticky. The topic will be shown in the first row regardless of what sorting has been applied by the user.	When the item has been removed as sticky by the module administrator
	The lead item has one or more attachments	When all attachments have been removed
	This is a newly created lead	3 days after the lead was created
	Changes have been made to the details of this lead item	When you view the lead details
	Comments have been added to this lead The number indicates how many new comments since you last accessed the lead item	When you view the lead details
	Access rights have been changed for this lead item	When you view the lead details
	You have been added to the lead item	When you view the lead details
	There is unread action logs in the Action Log tab	When you view/read the details in the action log tab.

17. Who are the module users?

User Type	Rights to Item
Owner	• User who needs to work on the lead • Can edit the lead item, i.e. Add/Remove Access, Edit Details, Close the lead • One per lead • Can comment to the leads • Can log actions in the Action Log tab • Can attach files
Moderator	• Assigned to moderate the lead • Can edit the lead item, i.e. Add/Remove Access, Edit Details, Close the lead • One or more users • Can comment to the leads • Can log actions in the Action Log tab • Can attach files
Item Member (usually called Topic Member)	• Can view the lead details • Can comment to the leads • Can attach files
Initiator	• User who initiates the lead • Can comment to the leads • Can attach files • Can be removed as item member
Submitter	• User who submitted the lead • Can comment to the leads • Can attach files • Can be removed as item member
Module Administrator	• Can access all the leads in LM module • Can edit all the leads in LM Module • Can comment to all the leads • Can attach files