



BluWave CRM- Leads Management

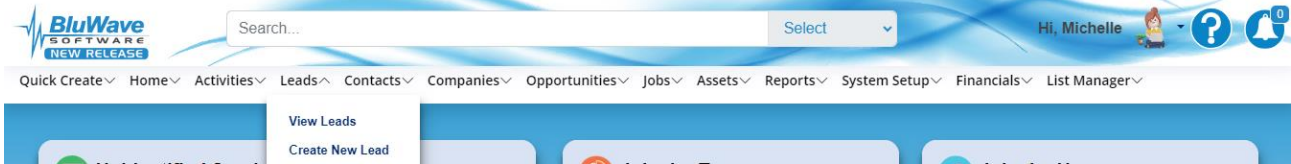


For support please contact: 011 462 6871 or support@bluwave.co.za.

1. Introduction

Leads are raw contacts with which you no pre-existing relationship with. Only once you do contact them, they could be converted to a company (if they are a viable potential customer referred to as a Prospect); only once it has been converted would you be able to create activities or opportunities for this company.

1.1 View Leads



Click on the **Leads** menu, then the **View Leads** option.

There are four sections to the view page (depending on whether or not you company allows the sales staff to claim leads):

- Unclaimed - all the leads that are not yet allocated to a specific sales staff.
- Active - leads that still need to be contacted by the specified sales staff.
- Converted - all the leads that were contacted and added to the Company list.
- Lost - all the leads that were contacted but were not interested/viable.

Below is a screenshot of the **Active** portion of the **View Leads** page.

#	Company	Rep Name	Source	Created	First Name	Surname	Designation	Cell	Tel	Fax
Del	African Scents	Alistair Barker	Phone in	14/02/2024	Thabo	Nkosi				
Del	Sword & Shield	Michaela Newey	Phone in	14/02/2024	David	Gemmel				
Del	Wild Voice	Alistair Barker	Google AD Words	14/02/2024	Trudi	Cannavan				
Del	Edge of Time	Michaela Newey	Google AD Words	14/02/2024	John	Gribbin				
Del	Leonardo Science	Michaela Newey	Google AD Words	14/02/2024	Michael	White				

1.2 Add Leads

To Add a new Lead to your database:

- Select **Lead** from the **Quick Create** dropdown
- Click on the **Create New Lead** on the **Leads** menu

The **New Lead** page will open; the user will enter all the required/available information regarding the contact.

New Lead [Save] [Save & New] [Cancel]

Lead Details * = Required Fields (enter either First Name or Surname)

Sales Staff	<input type="text" value="Michelle Bester"/>	Lead Status	<input type="text" value="Active Lead"/>
Title	<input type="text"/> First Name <input type="text"/> Initials <input type="text"/>	Lead Type	<input type="text"/>
Surname	<input type="text"/> *	Lead Source	<input type="text"/>
Designation	<input type="text"/>	No. of Employees	<input type="text"/>
Company	<input type="text"/> *	Industry	<input type="text"/>
Tel	<input type="text"/>	Notes	<input type="text"/>
Cell	<input type="text"/>		
Email	<input type="text"/>		
Staff	<input type="text"/>	Printer Type	<input type="text"/>
Number of Printers	<input type="text"/>	Main Application Use	<input type="text"/>
Financial Year	<input type="text"/>	Current Supplier	<input type="text"/>
End	<input type="text"/>		

Address Details

Postal Address	<input type="text"/>	Physical	<input type="text" value="Building/Office Park"/>
	<input type="text"/>		<input type="text" value="Street No and Name"/>
	<input type="text"/>		<input type="text" value="Suburb and Town"/>
Postal Code	<input type="text"/>	Code	<input type="text"/>
Country	<input type="text" value="South Africa"/>	Country	<input type="text" value="South Africa"/>

[Save] [Save & New] [Cancel]

Fields marked with an *****, are mandatory.

Lead Type & Lead Source, is populated according to your companies requirements.

The user defined fields are related to your company user defined fields.

To save the information entered, click on **Save** to return the **View Leads** page or click on **Save & New** to bring up a blank page for **New Leads** to add a consecutive lead.

1.3 Edit Leads

To edit a lead, click on the Company Name on the **View Leads** screen.

When editing a lead, the user will be able to update the lead details or convert the lead to a company.

If the user is only updating the lead information the User would click on the **Update** button, after making the relevant changes.

Changes can include updating the contact details or source and type information. The user would also be able to update the Status of the lead.

The statuses can be set-up as needed, however it would have an **active status**, which means the client still needs to be contacted and qualified (either immediately or in the future); a **sold/won status**, in our case the Qualified Converted status that means the lead has been qualified and converted to a company; a **lost status** that would move them to the lost view.

Edit Leads Add to Company List Update Cancel Print Lead

* = Required Fields (enter either First Name or Surname) Date Created: 07/03/2019

Sales Staff	Michelle Snyders	Lead Status	Active Lead
Title	First Name: Candy Initials: C	Lead Type	Active Lead
Surname	Sugarplum *	Lead Source	Qualified Converted
Designation			Not Interested
Company	Carnival Creations	No. of Employees	Future Interest
Tel		Industry	Unclaimed Lead
Cell	074 124 8523	Notes	xxxxxxxxxxxxxxxxxxxx
Email	candy@carnival.co.za		

1.3.1 Converting a Lead to a Company

When a lead has been qualified the user could easily convert the lead to a company, by editing the lead and clicking on the **Add to Company List** button.

Once the user clicks on the button, the system will direct the user to the appropriate **Edit Company** page.

When expanding the **Contacts** panel, the details on the Leads page will populate the first contact on the company.

1.4 Claiming Leads

When unclaimed leads are loaded into the system or imported, they will appear in the **Unclaimed** view of the **View Leads** page.

The screenshot shows the 'View Leads' page with a filter set to 'All Leads' and the 'Unclaimed' view selected. The table below contains the following data:

#	#	Company	Source	Created	First Name	Surname	Designation	Cell	Tel	Fax	Email
Claim	Del	Criminal Minds		28/07/2023	Franks	Gibbs	Owner				
Claim	Del	TVA	Cold Call	16/01/2022	Wayne	Davis	Manager	0822222222	011 112 125		

The sales staff would then only need to click on the **Claim** link next to the leads' name. There will be pop-up a message confirming that the lead was successfully claimed.

2. Revision History

Version	Date	Updates
BW0008	18/03/2019	<ul style="list-style-type: none">• Creation
BW0008.3	06/05/2024	<ul style="list-style-type: none">• Updated the screenshots to the new release