



LEAD TRACKING



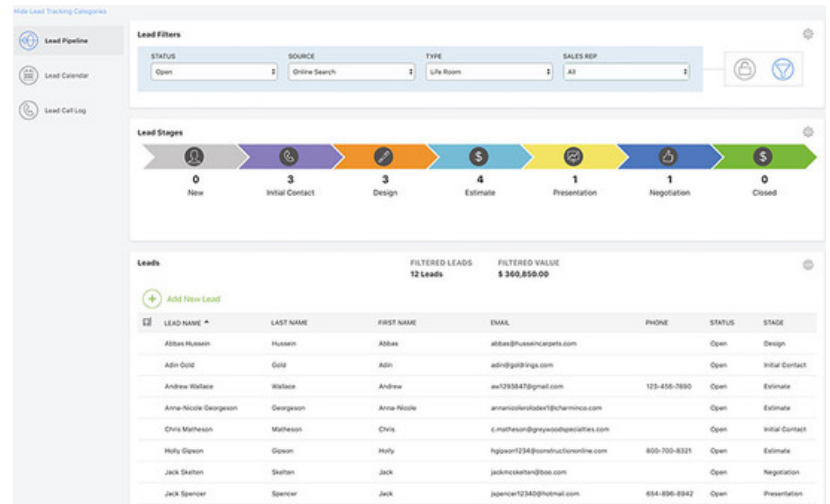
FEATURE GUIDE

ELEMENTS OF LEAD TRACKING

The key to building a successful company is to ensure continued revenue growth, and the most certain way to do so is through successful sales management. ConstructionOnline Lead Tracking provides powerful tools for managing incoming leads with custom pipeline stages, sales rep assignments, and callback dates that support lead prioritization, so your team can always be closing.

LEAD PIPELINE

Filter your leads by Stage, Status, Source, Sales Rep, and more to quickly see a clear picture of your current sales pipeline.

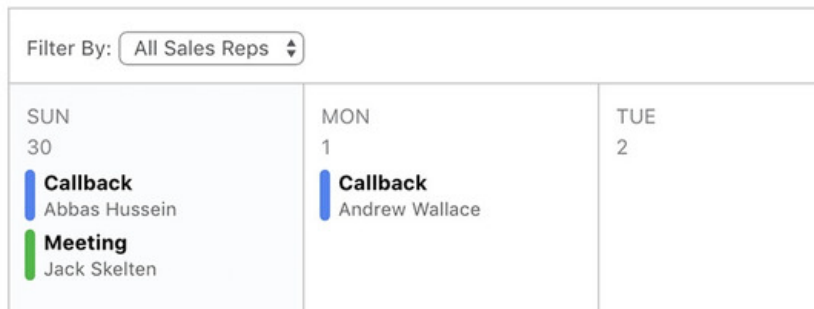


Lead Calendar

Go to Today



+ Add Lead Event



LEAD CALENDAR

Schedule callbacks and meetings to stay on track with lead communication. Attach files and docs to events to record when quotes were delivered for efficient lead management.

LEAD CALL LOG

Record duration & notes, save attached files, and more to maintain a comprehensive history of lead communication.

New Call Log Entry

Details Attachments

RELATED CONTACT

Rover Burroughs x

PHONE NUMBER

(800) 700-8321

CALL DATE

01/18/2019

START TIME

9:45 AM

DURATION

hr

15

min

sec

NOTES

Arial 14 B /

Spoke with Rover today and he would like to go ahead and move forward with the addition. Wanted to know when we could finalize the contract details. Set meeting for next Tuesday at 1:00 pm. |

PERMISSIONS

COMPANY EMPLOYEES

Lead Tracking access is exclusive to ConstructionOnline Company Employees. The level of access for each Company Employee is determined by the employee's particular Company Permission Settings. Provide "Can Create, Edit, & Delete" permissions to allow full Lead Tracking access or limit access with the "Cannot View" permissions setting.

The screenshot displays the 'User's Permissions for Company Projects' configuration page. At the top, there are tabs for 'Permissions', 'Notifications', and 'Password'. The main heading is 'User's Permissions for Company Projects' with a sub-heading 'Set permissions below to control what this employee can see and do in company projects.' Below this, there are several sections of permissions, each with a dropdown menu:

- Files and Photos:** Can Upload, Edit, & Delete
- RedLine™ Planroom:** Can Add, Update, & Delete Plans
- PROJECT TRACKING:**
 - Daily Logging: Can Create, Edit, & Delete
 - To Do Lists: Can Create, Edit, & Delete
 - Punch Lists: Can Create, Edit, & Delete
- FINANCIALS:**
 - Estimating: Can Create, Edit, & Delete
 - Client Selections: Can Create, Edit, & Delete
 - Change Orders: Can Create, Edit, & Delete
- PROJECT COMMUNICATION:**
 - RFI Tracking: Can Create, Edit, & Delete
 - Submittals: Can Create, Edit, & Delete
 - Transmittals: Can Create, Edit, & Delete
- CALENDARS & SCHEDULES:**
 - Calendar: Can Create, Edit, & Delete
 - Schedules: Can Create, Edit, & Delete
- LEAD TRACKING:**
 - Lead Tracking: Can Create, Edit, & Delete (selected), Can View, Cannot View

TEAMLINK USERS

Access to Lead Tracking is not available for TeamLink Users.

CLIENTLINK USERS

Access to Lead Tracking is not available for ClientLink Users.

LEAD CAPTURE

Collect Lead Information from your ConstructionOnline Public Profile and/or your independent website with innovative Lead Capture Tools.

Web Capture Settings

For Your ConstructionOnline Public Profile:

Enable this feature so potential clients can submit questions or comments via your Public Profile page. These visitors will be added automatically to your Leads list.

Show Lead Capturing fields on your Public Profile

For Your Website:

Add these fields to your website to capture Lead information directly into ConstructionOnline

Copy the Code

Copy the snippet and paste it into your webpage wherever you wish the fields to display



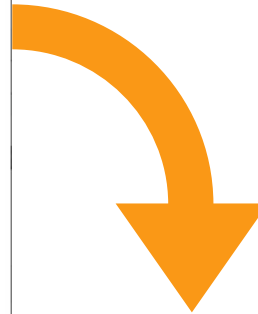
Copy the Code

Send to Developer

Send the code in an email to your web developer so they can implement it on your site



Email the Code



Choose who will receive notifications when form is submitted:

Send Email Send text message

Get in Touch with Us

Please fill out the forms below to submit your questions and comments.

First Name

Last Name

Email Address

Phone

Enter your questions and comments

Submit

ADDITIONAL LEAD CREATION METHODS

Additionally, you can create new leads in ConstructionOnline in bulk through a .CSV Import or individually with manual entry.

Import Leads



Import Leads

All valid leads in the .csv or .xlsx file will be added to your account. Leads will not receive email invitations.

CHOOSE FILE TO IMPORT

Choose File No file chosen.

Download Excel Template

CUSTOM LEAD FIELDS

To make Lead Tracking most beneficial to your company's particular needs, several of the fields in ConstructionOnline Lead Tracking can be customized to support tracking, filtering, and reporting that's most purposeful for your company.

ConstructionOnline provides content by default in these fields, however this default content can be retained, modified, and removed at your preference.

CUSTOM LEAD FIELDS

- Lead Stage - Customize lead stages to assess the process for effectively closing more deals
- Lead Source - Customize lead sources to analyze where, when, and how you are acquiring the highest volume of leads and the highest quality of leads
- Lead Type - Customize lead types for efficient filtered views and best fit intelligence

The screenshot displays the 'Lead Stages, Sources, and Types' configuration interface. It is divided into three main sections: Lead Stages, Lead Sources, and Lead Types. Each section has a corresponding tab and a 'Choose' button.

Lead Stages, Sources, and Types

Stages Sources Types

Choose Lead Stage Names and Icons:

<input checked="" type="checkbox"/>		New
<input checked="" type="checkbox"/>		Initial Communication
<input checked="" type="checkbox"/>		Needs Assessment
<input checked="" type="checkbox"/>		Presentation
<input checked="" type="checkbox"/>		Negotiation
<input checked="" type="checkbox"/>		Commitment to Buy
<input checked="" type="checkbox"/>		Sales Fulfillment

Choose Lead Source Names:

<input checked="" type="checkbox"/>	1.	Online Search
<input checked="" type="checkbox"/>	2.	Email Marketing
<input checked="" type="checkbox"/>	3.	Online Advertisement
<input checked="" type="checkbox"/>	4.	Social Media
<input checked="" type="checkbox"/>	5.	Partner Program
<input checked="" type="checkbox"/>	6.	Event / Show
<input checked="" type="checkbox"/>	7.	Inbound Call
<input checked="" type="checkbox"/>	8.	Outbound Call

Choose Lead Type Names:

<input checked="" type="checkbox"/>	1.	New Business
<input checked="" type="checkbox"/>	2.	Existing Business

PIPELINE MANAGEMENT

Effective management of your Lead Pipeline allows you to share valuable lead information that your team needs access to, including Total Leads, Total Value, Lead Distribution, and more!

The screenshot displays the 'Lead Pipeline' management interface. It includes a sidebar with navigation options: 'Lead Pipeline', 'Lead Calendar', and 'Lead Call Log'. The main area is divided into three sections: 'Lead Filters', 'Lead Stages', and 'Leads'. The 'Lead Filters' section has dropdown menus for STATUS (Open), SOURCE (Online Search), TYPE (Life Room), and SALES REP (All). The 'Lead Stages' section shows a horizontal flow of stages: New (0), Initial Contact (3), Design (3), Estimate (4), Presentation (1), Negotiation (1), and Closed (0). The 'Leads' section shows a table with 12 filtered leads and a total value of \$360,850.00. The table columns are LEAD NAME, LAST NAME, FIRST NAME, EMAIL, PHONE, STATUS, and STAGE.

LEAD NAME	LAST NAME	FIRST NAME	EMAIL	PHONE	STATUS	STAGE
Abbas Hussein	Hussein	Abbas	abbas@hussaincarpets.com		Open	Design
Adin Gold	Gold	Adin	adin@goldrings.com		Open	Initial Contact
Andrew Wallace	Wallace	Andrew	aw1293847@gmail.com	123-456-7890	Open	Estimate
Anna-Nicole Georgeson	Georgeson	Anna-Nicole	annanicoleroindex1@charminco.com		Open	Estimate

Filter Lead Pipeline by Stage, Status, Source, Type or Sales Representative

This close-up shows the 'Lead Filters' section with three dropdown menus: STATUS (Open), SOURCE (Online Search), and TYPE (All).

This close-up shows the 'Lead Stages' section with three stages: New (5), Initial Contact (3), and Design (3).

Customize Lead List by Column Order & Visibility

Column Order & Visibility

Choose which columns will show and in what order:

- Lead Name
- Lead Opened
- First Name
- Last Name
- Status
- Email
- Phone
- Stage
- Quality

Lock Preferred Lead Filters in your ConstructionOnline Profile for Easy, Efficient Access

This screenshot shows the 'Lead Pipeline' management interface with a lock icon on the 'Lead Filters' section. The 'Lead Stages' section shows a horizontal flow of stages: New (0), Initial Communication (0), Needs Assessment (0), Presentation (1), Negotiation (0), Commitment to Buy (2), and Sales Fulfillment (0). The 'Leads' section shows a table with 2 filtered leads and a total value of \$301,535.00. The table columns are LEAD NAME, LAST NAME, FIRST NAME, EMAIL, PHONE, STATUS, and STAGE.

LEAD NAME	LAST NAME	FIRST NAME	EMAIL	PHONE	STATUS	STAGE

LEAD REPORT

ConstructionOnline provides the ability for Company Employees to create professional, presentation-ready Lead Reports.

Lead Reports can be filtered by Status, Stage, Source, Type, and Sales Rep and may include Total Lead Value under selected filters.

Lead Report

STATUS: Open

STAGE: Follow Up / Demo Appointment

SOURCE: All

TYPE: All

SALES REP: All

Show Lead Value Total



Gipson Construction
2272 Moores Mill Road, Suite 201
Auburn, AL 36830



Lead Tracking Report

Filters Applied

FILTER TYPE	FILTER VALUE
Lead Status	Open
Lead Stage	Follow Up / Demo Appointment

NAME	COMPANY	STATUS	STAGE	QUALITY	VALUE	PROBABILITY
Aaron Holversen	Holverson Construction	Open	Follow Up / Demo Appointment	5/5	\$ 5,000,000.00	0%
Cynthia Smitherman	Axis Design	Open	Follow Up / Demo Appointment	3/5	\$ 5,000,000.00	0%
Kalyn Frederick	UDA Technologies	Open	Follow Up / Demo Appointment	3/5	\$ 500,000.00	0%



“ *ConstructionOnline™ is an incredible product. I've used Submittal Exchange, Procore, and Viewpoint and it ranks high above these.* ”

Colorado Structures
General Contractor



RELATED CONTACT MANAGEMENT FEATURES

CLIENTLINK

ConstructionOnline ClientLink Portals give you the power to create private branded, custom configured websites for your clients offerings the latest project updates, change orders, selections, calendars, files, photos, and more.

TEAMLINK

ConstructionOnline TeamLink Portals create powerful custom websites for your subcontractors, suppliers, and extended team members, providing access to the latest project updates, schedules, change orders, selections, calendars, files, photos, and more.

CONTACTS

Powerful contact management tools in ConstructionOnline allow for you to organize your employees, clients, and team members for quick access and open channels of communication. With the ability to set permissions at a project and feature level, you can be sure that everyone sees exactly what they need to see - and only what they need to see.