UDA ConstructionOnline™

LEAD TRACKING

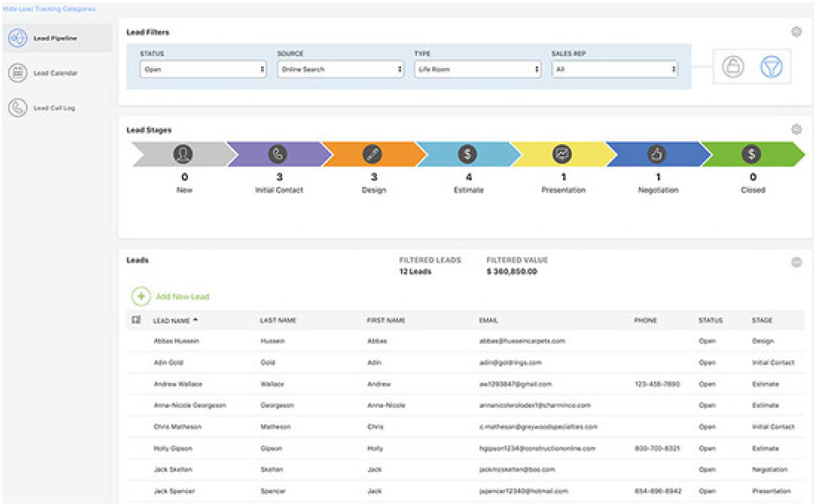
CO™ | FEATURE GUIDE

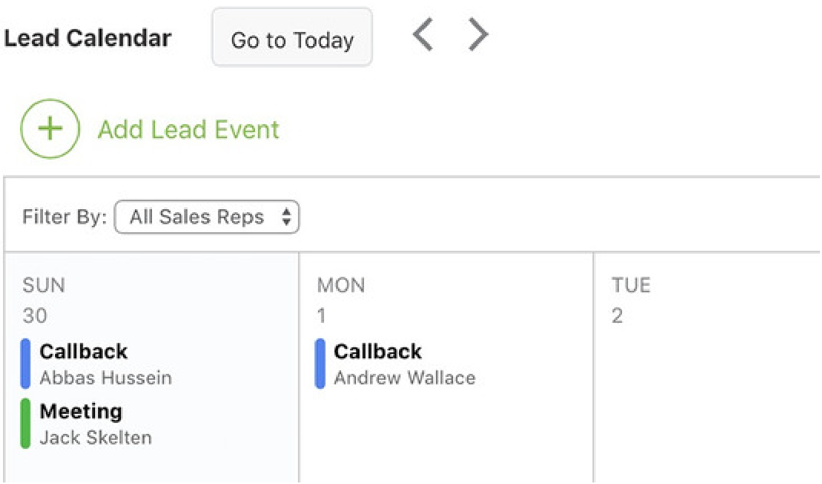
ELEMENTS OF LEAD TRACKING

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.



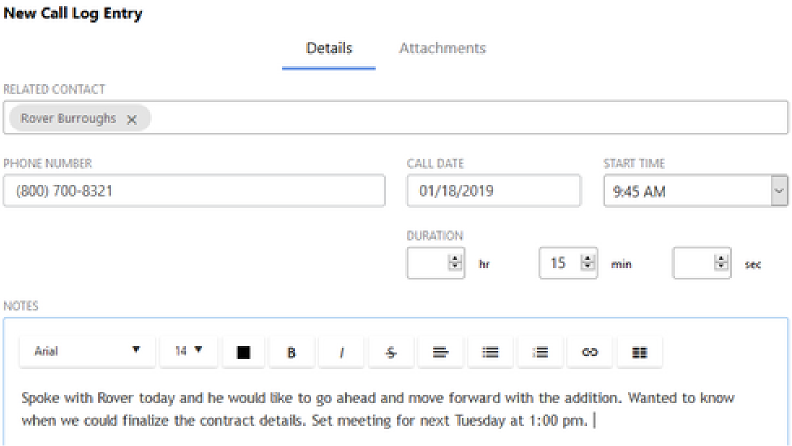


LEAD CALENDAR

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

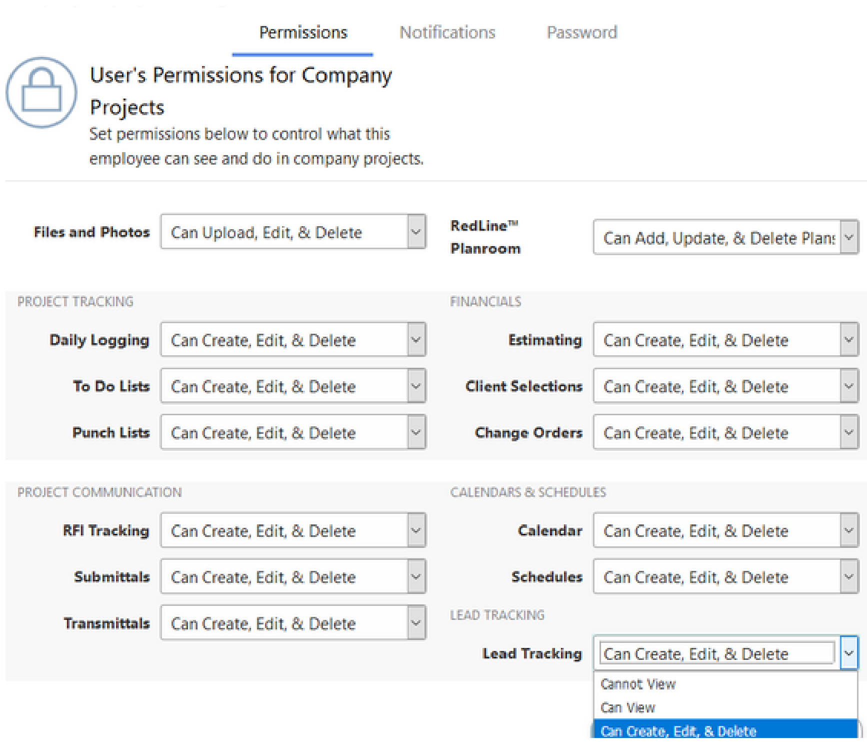
Record duration & notes, save attached files, and more to maintain a comprehensive history of lead communication.



PERMISSIONS

COMPANY EMPLOYEES

Lead Tracking access is exclusive to ConstructionOnline Company Employees. The level of access for each Company Employees 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.



TEAMLINK USERS

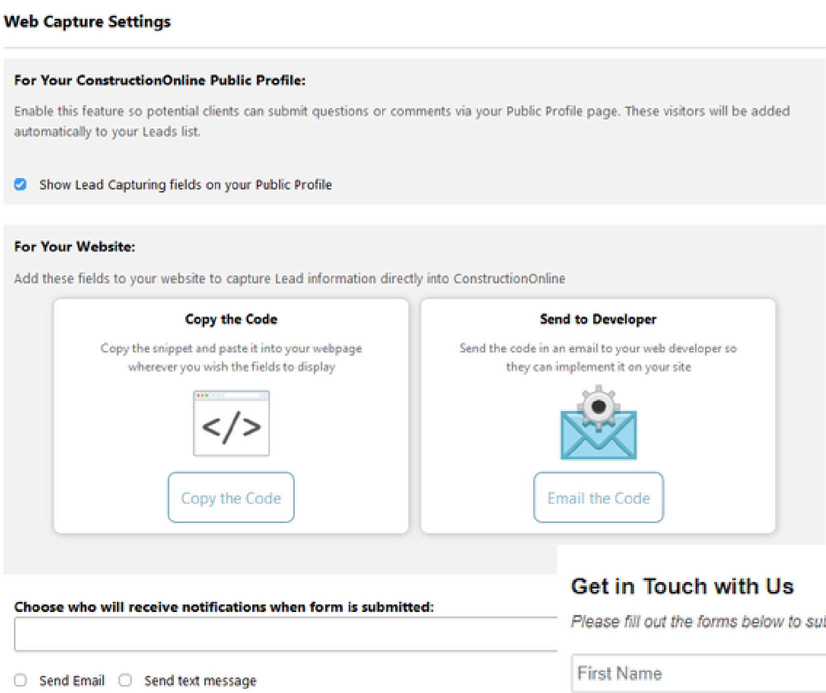
Access to Lead Tracking is not available for TeamLink Users.

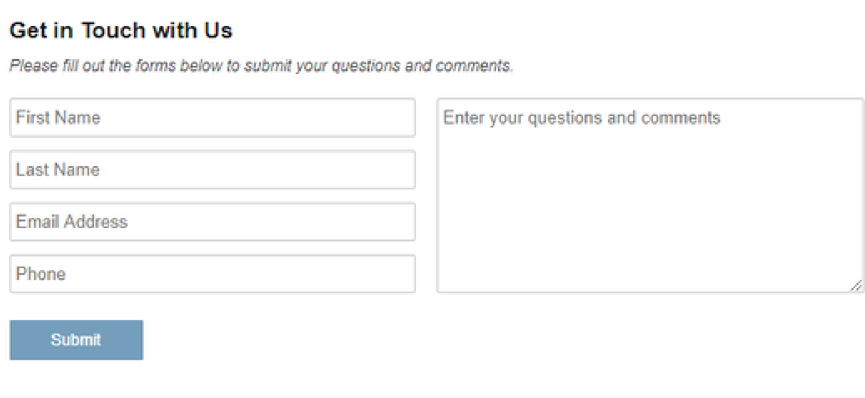
CLIENTLINK USERS

Access to Lead Tracking is not available for ClientLink Users.

LEAD CAPTURE

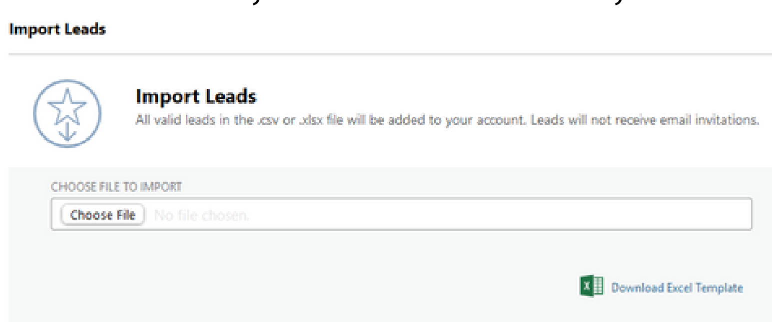
Collect Lead Information from your ConstructionOnline Public Profile and/or your independent website with innovative Lead Capture Tools.

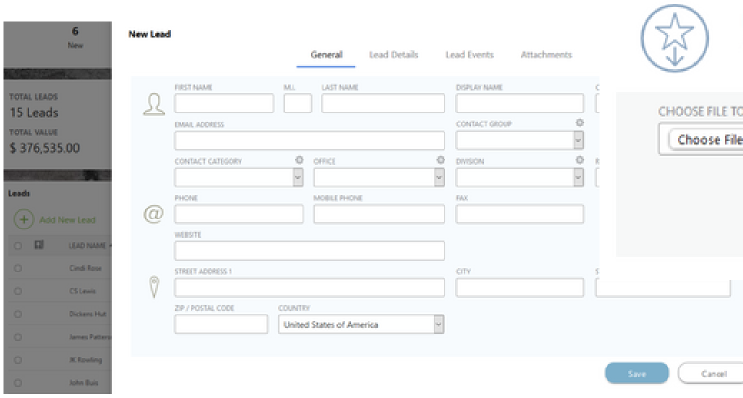




ADDITIONAL LEAD CREATION METHODS

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





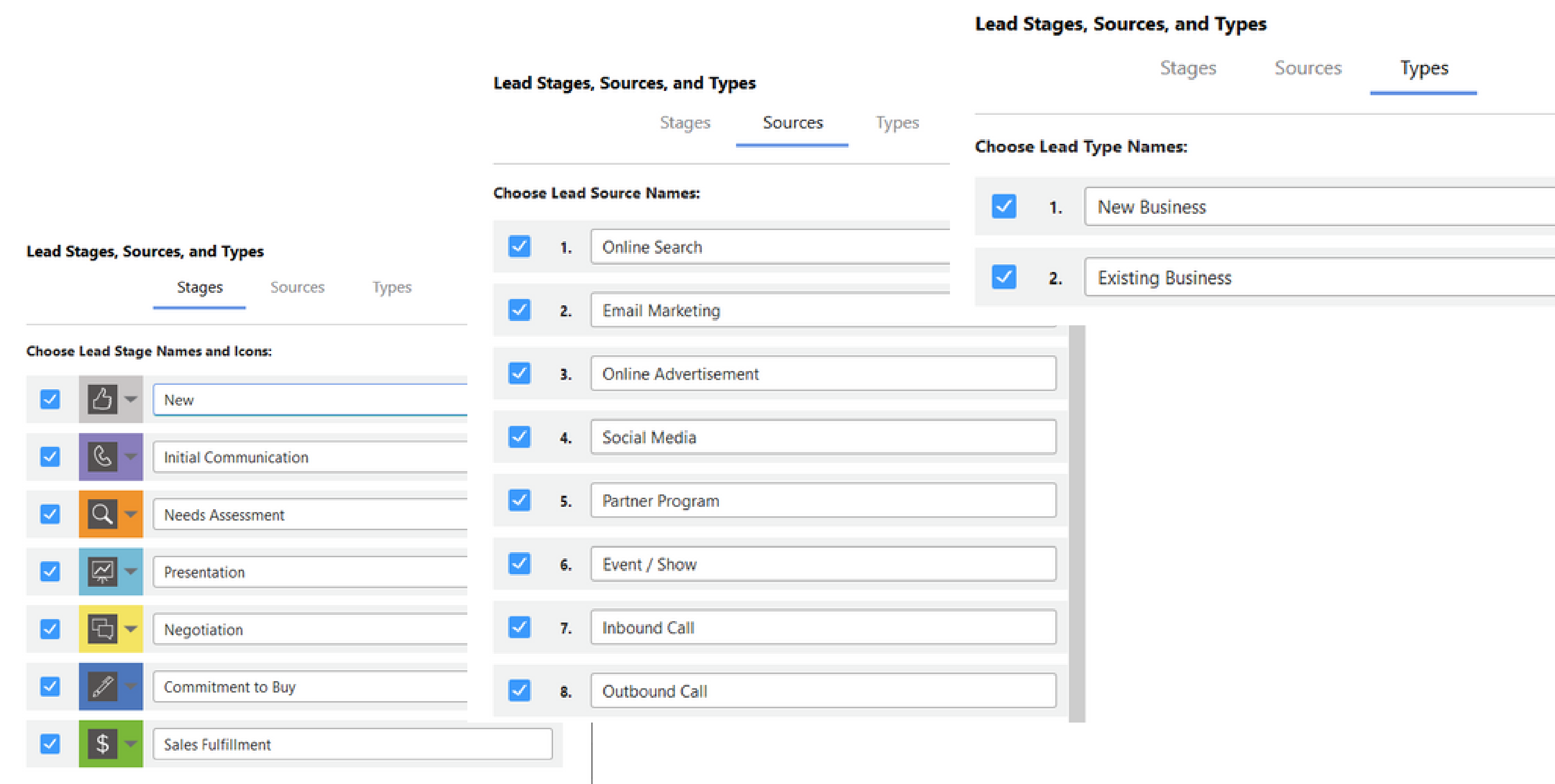
CUSTOM LEAD FIELDS

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.

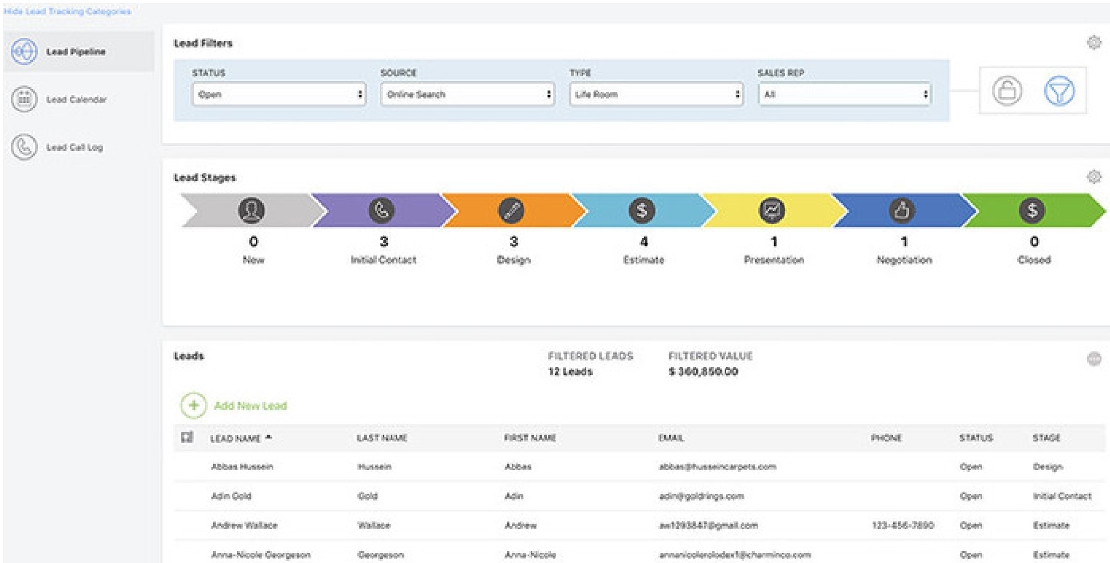
CUSTOM LEAD FIELDS

- Lead Stage - Customize lead stages to asses 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

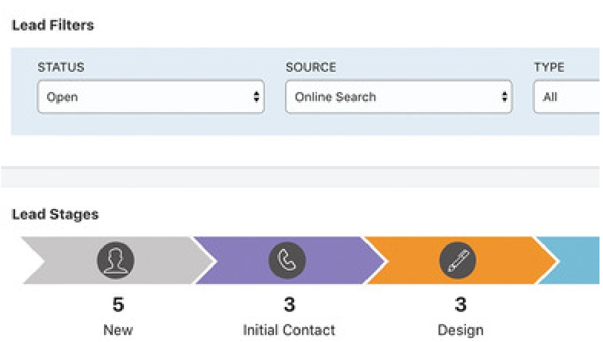


PIPELINE MANAGEMENT

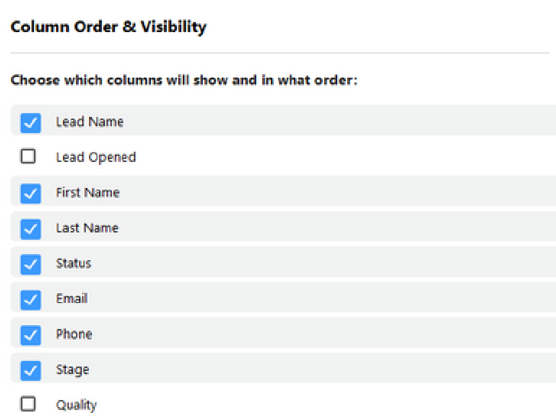
Effective management of your Lead Pipeline allows you to share valuable lead information that your team needs access to, including Total Leads, Total Value, Lead Distribution, and more!



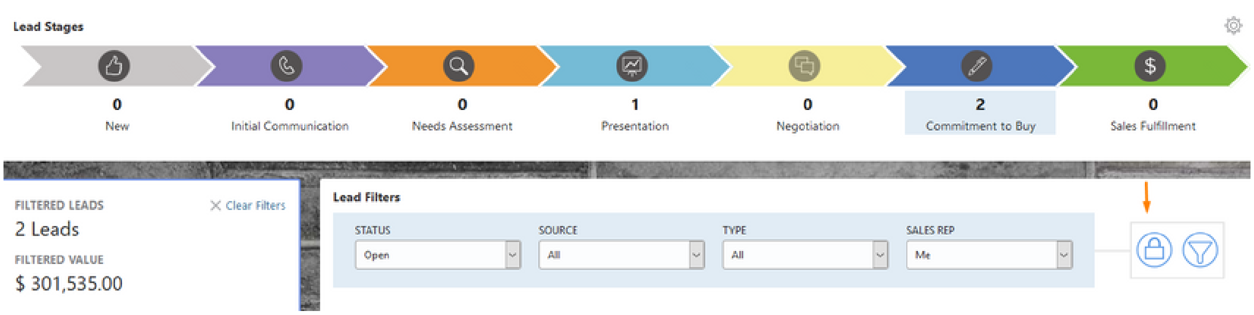
Filter Lead Pipeline by Stage, Status, Source, Type or Sales Representative



Customize Lead List by Column Order & Visibility



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



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

GIPSON CONSTRUCTION

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%

BETTER, FASTER, EASIER CONTACT MANAGEMENT

> *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.