

# Getting Started with Lead Tracking

**Filtered Leads Summary:**  
FILTERED LEADS: 514 Leads  
FILTERED VALUE: \$78,706,150.00

**Lead Stages:** 1020 New

**Lead Filters:** STATUS: Open

**Lead List:**

LEAD NAME	EMAIL	PHONE	STATUS	STAGE	QUALITY	COMPANY
1 - Aaron Holversen	aaronh@heritagedb.com	(608) 555-1212	Open	Follow Up / Demo Appointment	★★★★★	Holverson Construction
Aaron Bustillos	aaren@knightsvcs.com	(469) 390-7858	Inactive	New	★★★★★	Knight Renovations
Aaron Cho	cho@hotmail.com	(802) 371-9433	Open	Follow Up / Demo Appointment	★★★★★	ALACHO
Aaron Faubion	aaronflint@psshift.com	(612) 767-2935	Open	Follow Up / Demo Appointment	★★★★★	Flint Builders
Aaron Flint	aaronflint@psshift.com	(250) 883-7674	Open	Follow Up / Demo Appointment	★★★★★	A & A 1st Choice
Aaron McDuffie	amcduffie@leadu@vda9.com	(785) 856-3039	Open	Follow Up / Demo Appointment	★★★★★	Yager Co
Aaron Reeves	aaron@ortextdev.com		Inactive	Follow Up / Demo Appointment	★★★★★	
Aaron Yager	ayager@vagerconstruction.ca		Inactive	Follow Up / Demo Appointment	★★★★★	
Abbi Duncan	abbi.duncan@gmail.com		Inactive	Follow Up / Demo Appointment	★★★★★	
Adam Frederiksen	a.fred@vareconstructionindustries.com		Inactive	Follow Up / Demo Appointment	★★★★★	

# The Lead Pipeline View

This is where you'll add and manage Lead information. Define your pipeline with customizable stages, set statuses, assign sales reps and much more. Powerful filtering options give you a clear picture of your sales process, and help you define your best path for success.

Create Lead Stages to build your pipeline and see exactly where your sales process stands.

The screenshot displays the Lead Pipeline View interface. At the top, there is a search bar for leads and a user profile for 'Gipson Construction'. The left sidebar contains navigation options: Lead Pipeline, Lead Calendar, Lead Call Log, and Opportunities. The main content area is divided into three sections:

- Lead Stages:** A horizontal pipeline diagram with six stages: New (1020), First Phone Call (21), Sales Appointment (33), Estimate (13), Follow Up / Demo Appointment (11), and Contract Awarded (2).
- Filtered Leads:** A summary box showing 16 leads with a filtered value of \$1,000,010.00. It includes a 'Clear Filters' button.
- Lead Filters:** A section with dropdown menus for STATUS (Open), SOURCE (Call In), TYPE (New Business), and SALES REP (All). It also features lock and funnel icons.
- Leads Table:** A table listing individual leads with columns for LEAD NAME, EMAIL, PHONE, STATUS, STAGE, QUALITY, and COMPANY. A '+ Add New Lead' button is located above the table.

LEAD NAME	EMAIL	PHONE	STATUS	STAGE	QUALITY	COMPANY
Aaron Holversen	aaronh@heritagedb.com	(608) 555-1212	Open	Follow Up / Demo Appointment	★★★★★	Holverson Construction
Aaron Bustillos	aaron@knightsvcs.com	(469) 330-7838	Inactive	New	★★★★☆	Knight Renovations
Aaron Cho	cho@hotmail.com		Open	Follow Up / Demo Appointment	★★★★☆	AACHO
Aaron Faubion	aaron@fortexdev.com		Open	First Phone Call	★★★★☆	
Aaron Flint	aaronflint@pshift.com	(802) 371-9433	Inactive	Estimate	★★★★☆	Flint Builders
Aaron McDuffie	amcduffthelead@uda9.com		Open	New	☆☆☆☆☆	
Aaron Reeves	aa1stchoice512@yahoo.com	(512) 767-2935	Closed - Lost	Estimate	★★★★★	A & A 1st Choice
Aaron Yager	aaron@yagerconstruction.ca	(250) 883-7674	Inactive	First Phone Call	★★★★☆	Yager Construction

Apply filters to your list to see updated Lead Values.

View and manage your Leads here with easy in-grid editing options.

# The Lead Calendar View

Here's where you can schedule callbacks and meetings to stay on track with your lead communication. Attach quotes, invoices, marketing materials and more to efficiently organize your sales practices.

The screenshot displays the 'Lead Calendar' interface. At the top, there's a navigation bar with a '+ New' button and the user's name 'Gipson Construction'. Below this, a 'Lead Calendar' section includes a 'Go to Today' button and navigation arrows. A 'Filter By: All Sales Reps' dropdown is visible. The main area is a calendar grid for the week of April 21-27, 2019. The grid shows lead events for various sales reps across different days and times. A 'Meeting' popup is shown for Annette Foxworth on Tuesday, April 23, 2019, from 10:00 AM to 11:15 AM. On the right side, a 'Weekly Call List - 04/21/2019 to 04/27/2019' sidebar shows a list of 4 callbacks, with the first one being '1 - Aaron Holversen'.

Day	MON 22	TUE 23	WED 24	THU 25	FRI 26
6:00 AM					
7:00 AM					
8:00 AM				Greg Helton 8:00 AM - 9:30 AM	Craig Johannesen 8:30 AM - 9:30 AM
9:00 AM	1 - Aaron Holve... 9:00 AM - 11:30... Adi Vem 9:00 AM - 10:00...		Alan Nick 9:00 AM - 10:00 AM		
10:00 AM		Annette Foxworth 10:00 AM - 11:15 AM		Holly Gipson 10:00 AM - 11:00 AM	
11:00 AM			Alicia Mitton 11:00 AM - 12:00 PM	Brian Smith 11:30 AM - 1:00 PM	Bruce Schweich 11:00 AM - 12:45 PM
12:00 PM			Aaron Flint 12:00 PM - 1:00 PM		
1:00 PM					
2:00 PM					
3:00 PM					

**Weekly Call List - 04/21/2019 to 04/27/2019**  
0 of 4

- 1 - Aaron Holversen**  
Holverson Construction  
608-555-1212  
aaronh@heritagedb.com  
🕒 9:00 AM-9:15 AM
- Alicia Mitton**  
SplashworksKB  
416-780-0888  
amitton@swkb.ca  
🕒 11:00 AM-12:00 PM
- Aaron Flint**  
Flint Builders  
(802) 371-9433  
aaronflint@pshift.com  
🕒 12:00 PM-1:00 PM
- Craig Johannesen**  
Johannesen Builders  
541-318-1791  
craig@bendbuilder.com  
🕒 8:30 AM-9:30 AM

Get an overview of upcoming Lead Events in Day, Week and Month Views.

See a running list of your Callbacks and easily track your progress.

# The Lead Call Log View

Those who don't learn from the past are doomed to repeat it - a comprehensive historical record of lead communication is key to future success. The Lead Call Log is an easy and intuitive way for your team to document what's been discussed to date.

The screenshot displays the 'Lead Call Log' interface. At the top, there is a '+ New' button and a user profile for 'Gipson Construction'. The left sidebar shows navigation options: 'Lead Pipeline', 'Lead Calendar', 'Lead Call Log' (selected), and 'Opportunities'. The main content area is titled 'Lead Call Log' and includes a '+ Add Call Log Entry' button. Below this, there are filters for 'Show Call Log For:' and 'Created By:', both set to 'All Contacts'. The main area contains a list of call log entries:

- Aaron McDuffie** (AM) - 04/01/2019 11:30 AM • Jim Davis. Note: Discussed options with Aaron for kitchen remodel services.
- Abigail Estes** (AE) - 04/01/2019 11:15 AM • Jim Davis. Note: She submitted an info request through our website and is interested in what we can offer. She is planning on building a new home within the next 6 months and is wanting to know more about the Sherwood model. I sent her some followup literature and she said she would get back in touch within the week.
- Maury Severin** (MS) - 11/16/2018 4:00 PM • Holly Gipson. Note: Followed up with Maury and sent him a revised proposal for 212 Eastlake Blvd. Includes attachments: a Word document, a photo of a building under construction, and a PDF document.
- Sam McDuffie** (SM) - 11/15/2018 4:00 PM • Holly Gipson.

An 'Edit Call Log Entry' modal window is open, showing details for the entry by Abigail Estes. The modal has tabs for 'Details' and 'Attachments'. Fields include: 'RELATED CONTACT' (Abigail Estes), 'PHONE NUMBER' ((111) 222-9876), 'CALL DATE' (04/01/2019), 'START TIME' (11:30 AM), and 'DURATION' (0 hr, 25 min, 0 sec). There is a rich text editor for 'NOTES' with a toolbar and a 'Save' button.

See a running log of Lead notes, call duration, attachments and more.

Easily edit Call Log details at any time.

# Getting Leads Into ConstructionOnline

It's easy to get new leads into your pipeline with ConstructionOnline. You can implement a Lead Capture form on your public profile or website to allow potential clients to submit requests on their own. If you have a list of leads ready to go, you can quickly import them as a CSV file.

## Capture Leads from the Web

### 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:**  
Holly Gipson x

Send Email  Send text message

[Save](#)

Choose to activate the Lead Capture form on your ConstructionOnline Public Profile or your company site.

## Import Leads

### 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](#)

Download the Excel template if you don't have a list of your leads already.

### 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 or comments

[Submit](#)