UDA ConstructionOnline™

Getting Started with Lead Tracking

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.

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Hide Lead Tracking Categories

- Lead Pipeline
- Lead Calendar
- Lead Call Log
- Opportunities

Lead Stages

1020 New	**21** First Phone Call	**33** Sales Appointment	**13** Estimate	**11** Follow Up / Demo Appointment	**2** Contract Awarded

FILTERED LEADS   ✕ Clear Filters
16 Leads

FILTERED VALUE
$ 1,000,010.00

Lead Filters

STATUS	SOURCE	TYPE	SALES REP
Open	Call In	New Business	All

Leads

Date Created: All

⊕ Add New Lead

☐	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.

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.

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 ✕

☑ Send Email   ☐ Send text message

Save

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

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

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.