Closing Leads

Last Modified on 06/23/2022 1:53 pm EDT

This guide explains how to close a sales lead. It is intended for general users.

When closing a lead, aACE helps you track wins and losses.

- 1. Navigate from Main Menu > CRM & Sales > Leads.
- 2. Use the <u>Quick Search (https://aace6.knowledgeowl.com/help/using-the-quick-search-bar)</u> bar to locate the desired lead.
- 3. At the detail view menu bar, click **Actions** > **Close Lead**.
- 4. Specify whether the lead was **Won** or **Lost**.
 - For leads that you Won:
 - Notes Record any final details about this business opportunity.
 - Orders & Quotes If there were multiple quotes, select those that the customer chose. aACE will automatically open that order and void the others.

ead Info		Туре	Sales Rep >	Comments					
Brightside Charter School		Sales Inquiry JG Q							
loute Email	Source Advertisement	Campaign C 50002 Q	ustomer PO #						
otes				New Entry					
rders & Quotes Grder	Title		Tracking Status		Est Cost	Total Marg	in Likel	y Amt St	Comment atus <u>Select</u>

- For leads that were Lost:
 - Reason for Loss Select from the dropdown list.
 Note: If a new reason is relevant to multiple leads, ask your system admin to update the relevant system value list (https://aace6.knowledgeowl.com/help/working-with-value-lists).
 - Reason for Loss Notes Add details to help clarify the situation or improve future efforts.

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	Lead was: 🔾 Won 🔘	LUSL		Cancel Close Lead
Lead Info		¥	Comments	
Title Brightside Charter	School	Type Sales Inquiry		
Route	Source	Campaign		
Email	Advertisement	50002 Q		
Reason for Loss				
>				
Reason for Loss Note				

5. Click Close Lead.

Setting Required Fields for Leads

Your system administrator can set flags to make the Campaign, Type, Route, or Source fields required: Main Menu > System Admin > Preferences > Order Entry.

When these fields are flagged, aACE validates the data when you close the lead, requiring you to enter information before allowing the lead to be saved as Won or Lost.