Understanding Lead Management

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This guide explains how to manage leads. It is intended for general users.

aACE customer relationship management (CRM) features can be vital for tracking leads you have created. You can view company-specific leads by navigating from the Main Menu to CRM & Sales > Companies > specific company record > Sales & Marketing. For a full view of all leads, you can access the Leads module from Main Menu > CRM & Sales > Leads.

For an example of how aACE features for leads can help your team, refer to our feature highlight (https://www.aacesoft.com/resources/nurture-your-leads-from-first-contact-to-final-sale-in-aace).

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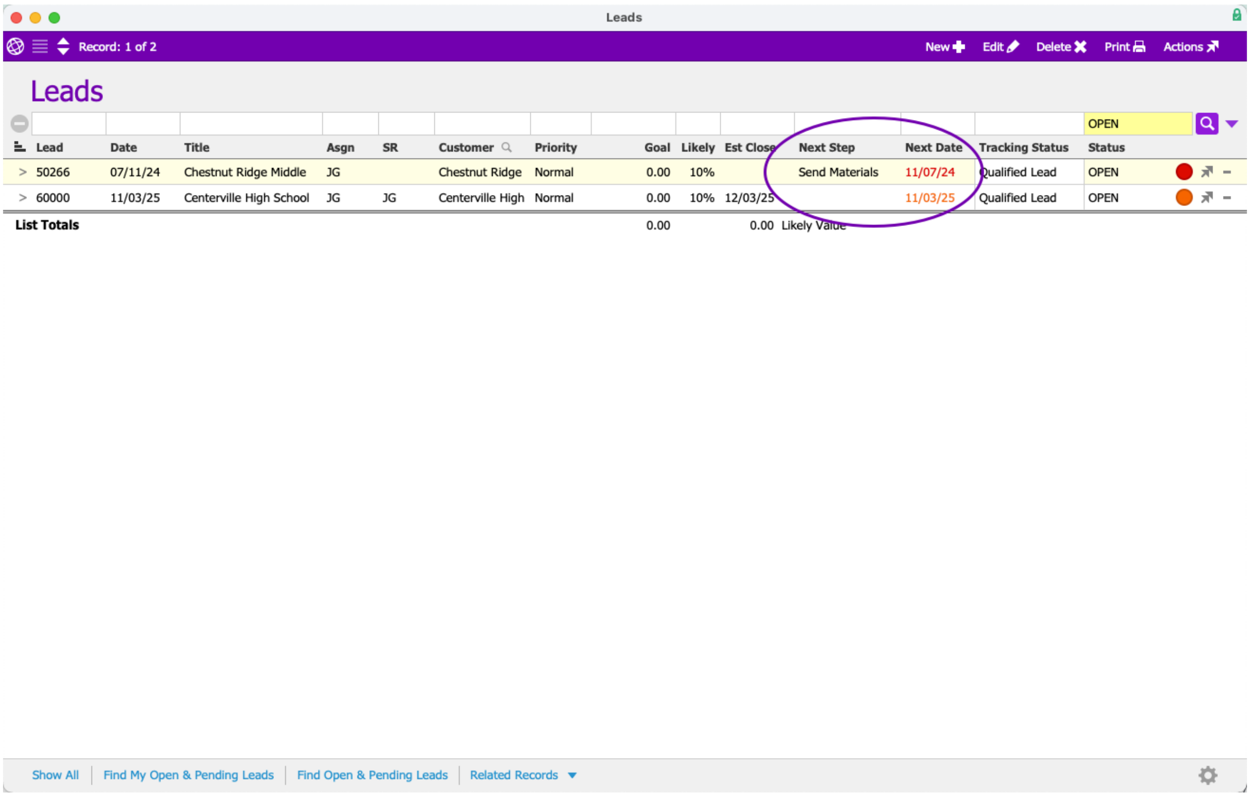
Leads List View

The list view in the Leads module shows the leads associated with the current user. Key information for sales staff are the Next Step and Next Date fields, which are modified on the lead's detail view. You can filter the list of leads on the list view by the dates that tasks are due to help focus on key contacts.



The Next Date controls the color of the lead Status icon:

- Green Status icon ( ) — Future due date
- Orange Status icon ( ) — Due date is today
- Red Status icon ( ): Past due date

These Status icons also display on the detail view to help prioritize your work.

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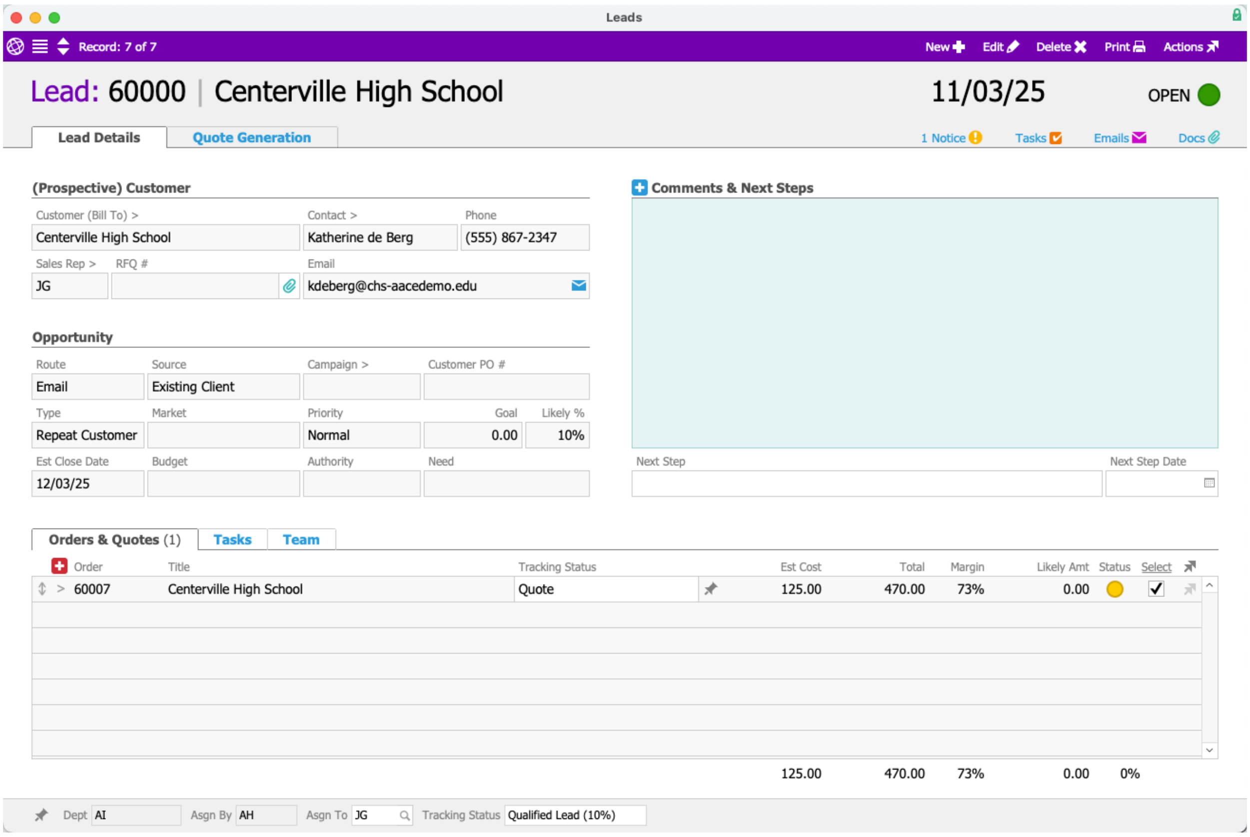
Leads Detail View

A lead detail view (https://aace6.knowledgeowl.com/help/overview-of-leads) allows you to review past interactions, monitor current steps, and forecast potential sales.



Tracking Progress with Tasks

On the Tasks tab, you can add tasks to provide lead progress visibility by selecting the Add icon ( ):

- **Task** — Opens the Tasks module where you can enter information for a new task. The list of related tasks is listed in the Tasks tab.
- **Tasks from Task Group** — Opens the Tasks Group Selector where you can choose an existing task group (https://aace6.knowledgeowl.com/help/creating-task-groups). The series of tasks from the task group will be added to this list.

The task entry that has the Next flag marked is also displayed in the Comments and Next Steps section. When you select the task line Actions icon ( ) and select Mark Task as Complete, that task is set to Complete status and the subsequent task is flagged as Next.

Tracking Progress with Comments and Next Steps

The Comments and Next Steps (https://aace6.knowledgeowl.com/help/adding-activities-support-or-next-steps) section records less structured interactions and maintain visibility on tasks.

To enter a comment documenting a customer interaction, select the Add icon ( ). Summarize the activity, specify a next step, and assign a step due date. After you select the Submit Next Steps button, your comments are displayed in the module along with your name and timestamp.

You can also update the Next Step fields. When you manually enter a Next Step, it overrides the task currently flagged as Next and interrupts automatic tracking of task group activities. To restore automatic tracking, simply clear the Next Step field. aACE will then populate it with the task flagged as Next.

Sales Forecasting

The Goal and Likely % fields interact with orders to calculate the sales you expect a lead to generate:

- Goal — Enter the dollar amount the lead will ideally produce
- Likely % — Enter a percentage that reflects your current estimated chance of winning the lead
- Est Close Date — This date is required for information to display in some reports

After you have an open order linked to the lead, aACE can compile the number of units for possible sale, the number of leads, and the average percentage of likelihood to close, forecasting how many units you should have on hand. As you update the Goal, the Likely %, or the order, aACE updates the anticipated totals at the bottom of the Orders & Quotes section. You can also view these features in more detail at the Quote Generation tab.

To review various forecasting totals, access the Leads module's reports selector (https://aace6.knowledgeowl.com/help/understanding-reporting) and use the inventory or sales forecasting reports.

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Managing Orders & Quotes

You can build multiple orders for a lead. These orders can be organized as components of a larger project or as competing options for the customer to choose between. To add an order at the lead's detail view, click the Add icon ( ):

- **Build Order from Previous Order** — Displays the Order Selector where you can choose a previous order from this customer to duplicate. If the current order is the customer's first order, selecting this option will generate a second order that matches the current

one.
- **Build Order from Template** — Displays the Templates Selector, filtered to show order templates you can choose.

The order Actions to Import Order Items and to Build Order Items from Actuals are also accessible, but are not generally relevant to preparing quotes.

In the Orders & Quotes list, you can mark Select for an entry. aACE will use the selected order(s) for calculating with the Goal amount and Likely % fields, generating the anticipated sales amounts. If your company uses mutually exclusive quotes, we recommend that you select only the order that is most likely to close with a win.

To send quotes to customers, in the menu bar, click the Print icon ( ). You can print or email the quotes in two formats:

- **Print as Options** — Lists the selected orders as separate totals the customer can choose from.
- **Print as Summary** — Combines the selected orders into a grand total.

After the customer makes their decision, you can mark leads as 'won' or 'lost' (https://aace6.knowledgeowl.com/help/closing-leads).