

Overview of Leads

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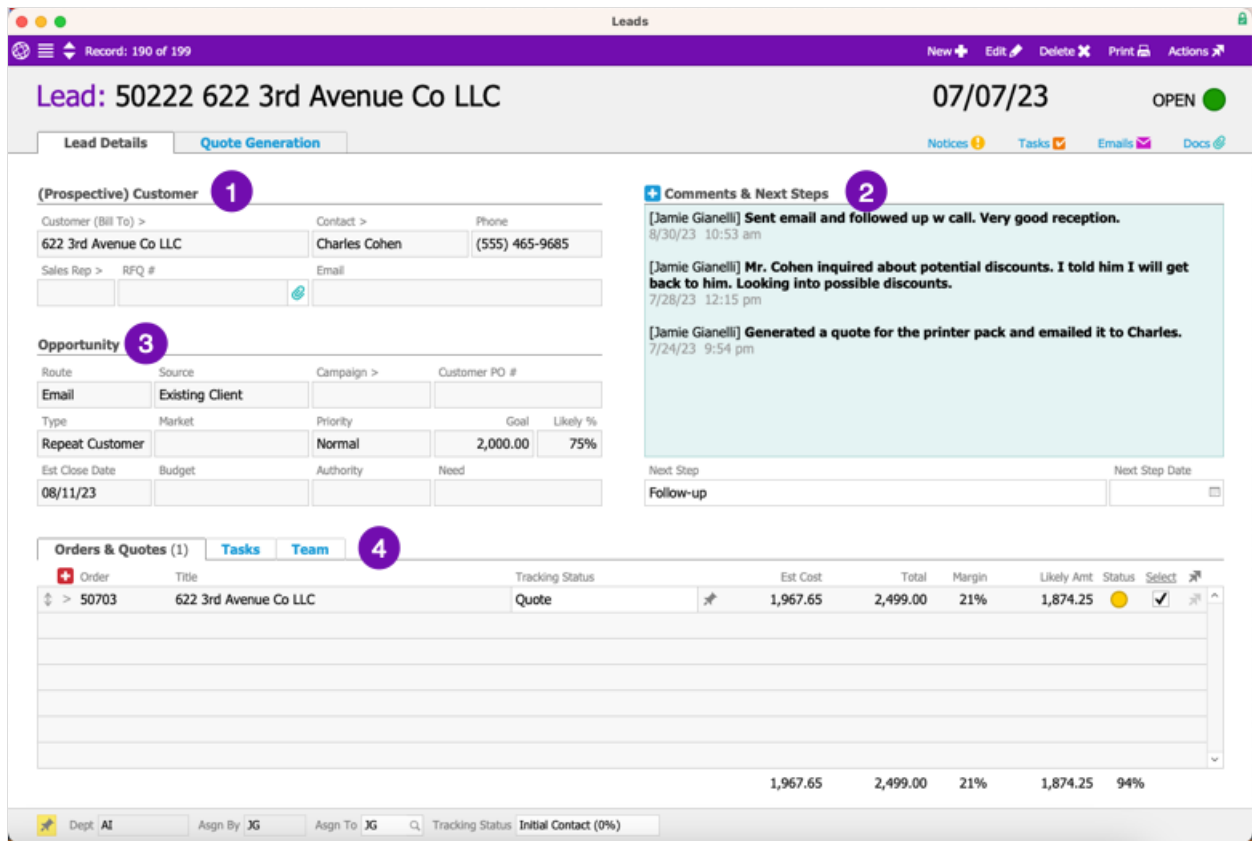
This guide provides a brief overview of the Leads module. It is intended for general users.

In aACE, [leads represent business opportunities](https://aace6.knowledgeowl.com/help/understanding-lead-management). A lead is linked to an aACE company or contact record to keep track of communication. You can associate leads with both new and existing customers.

The Leads module helps you view and manage your sales leads, [create new leads](https://aace6.knowledgeowl.com/help/creating-leads), edit them as needed, and generate quotes. To access the Leads module, navigate from Main Menu > CRM & Sales > Leads.

Lead Details Tab

After you create a lead or access an existing lead, you can access information on the [detail view](https://aace6.knowledgeowl.com/help/overview-of-the-detail-view). You can easily track the prospective company, where the lead came from (i.e. referral, advertisement, existing client), the current next steps, and certain related records.




1. (Prospective) Customer

You can track and provide links to the prospective customer's [company record](https://aace6.knowledgeowl.com/help/overview-of-companies) (<https://aace6.knowledgeowl.com/help/overview-of-companies>), the primary contact for the company, various contact methods, and the assigned sales representative from your company.

2. Comments & Next Steps

You can record [important notes and comments](https://aace6.knowledgeowl.com/help/adding-activities-support-or-next-steps) (<https://aace6.knowledgeowl.com/help/adding-activities-support-or-next-steps>) about the lead, including the next steps. Information entered here also auto-populates the Comments & Next Steps field in the Quote Generation tab.

You can add a new comment or activity by clicking the Add icon (). Next Steps helps you monitor what is happening with your lead. You can set a next step and a date for the step in their corresponding fields.

3. Opportunity

The Opportunity section specifies details about where the lead came from, including the route, source, campaign, type, and priority. You can use these features to create [more](#)

[accurate sales forecasts](https://aace6.knowledgeowl.com/help/understanding-lead-management#SalesForecasting) (https://aace6.knowledgeowl.com/help/understanding-lead-management#SalesForecasting).

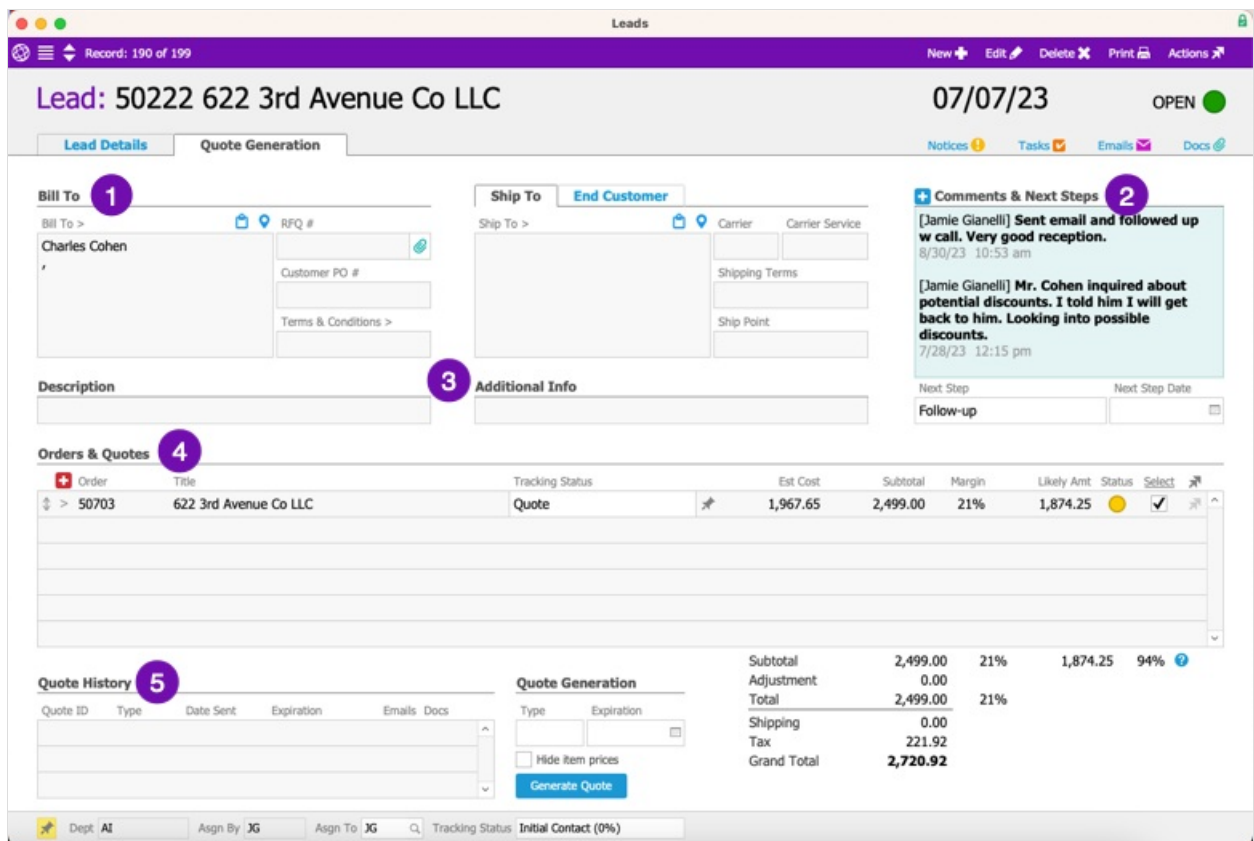
4. Additional Portals

These tabs track and provide links to related [orders / quotes](https://aace6.knowledgeowl.com/help/overview-of-orders) (https://aace6.knowledgeowl.com/help/overview-of-orders), [tasks](https://aace6.knowledgeowl.com/help/overview-of-tasks) (https://aace6.knowledgeowl.com/help/overview-of-tasks), and [teams](https://aace6.knowledgeowl.com/help/overview-of-teams) (https://aace6.knowledgeowl.com/help/overview-of-teams).

Quote Generation Tab

In aACE, Pending orders are called 'quotes'. From the Quote Generation tab, you can put together quotes for your prospective customer company. You can also view and manage quote history from this tab.

The quote generation tab looks similar to an [order record's detail view](https://aace6.knowledgeowl.com/help/overview-of-orders) (https://aace6.knowledgeowl.com/help/overview-of-orders).



1. Bill To & Ship To Fields

You can specify details related to billing and shipping, including the Bill To and Ship To

company and addresses. Additionally, you can enter an RFQ number, PO number, or link a terms & conditions record, if applicable.

2. Comments & Next Steps

This Comments & Next Steps section is a smaller version of the same section on the Lead Details tab. It includes the same features and functionality as the field on the Lead Details tab (i.e. comments, next step, next step date).

3. Description and Additional Info Fields

The Description field is used to add critical information about the lead, such as the context and situation. The Additional Info field holds any other details relating to the lead.

The information in these fields also appears on [a generated quote for customers](#).

4. Orders & Quotes

You can view a list of quotes in the Orders & Quotes section. When you create a quote from this view, aACE automatically links the quote to the lead. This makes all your quotes for a lead easily accessible.

5. Quote History and Quote Generation

When your customer is ready for a quote, you can generate and [email the quote](#) (<https://aace6.knowledgeowl.com/help/understanding-aace-email-integration>) from this section. You can choose from two types of quotes:

- Summary Quote — Provides a summary of the selected pending orders' totals
- Options Quote — Presents the selected pending orders as options, including a individual totals for each order

aACE displays any existing quotes for the lead in the Quote History section.