

# Leads

Last Modified on 07/27/2023 9:52 am EDT

## Leads

Menu path: Leads > Listing View or Kanban View

The new lead created by the Quick Quote is listed.

Information from the Quick Quote includes Open Amount, Open RMR, Email, Cell Phone, Work Phone, Department, Primary Sales, and Created By.

Users can edit the lead and add new proposals.

### Leads Listing View

Lead	Entry D.	Heat	Stage	Follow Up...	Open A...	Open R...	Email	Cell Phone	Work Phone	Department	Primary Sales...	Created By	Tags
Jones Sr., Matthew	03/05/20...	Warm	Not Attempted		\$1,590.00	\$35.00			7342289933	Residential S...	Johnson, Carolyn	C.Jest (Johnson...	
Cunningham, April	03/02/20...	Warm	Not Attempted		\$1,164.94	\$48.00	april.z.cunningha...		7342246644	Residential S...	Johnson, Carolyn	C.Jest (Johnson...	
Franklin, Gloria	03/02/20...	Warm	Not Attempted		\$1,164.94	\$48.00	g.franklin9988@g...		7342287722	Residential S...	Johnson, Carolyn	C.Jest (Johnson...	
Chapman, Grace	03/02/20...	Warm	Not Attempted		\$1,164.94	\$48.00	grace.chapman@...		7342283311	Residential S...	Johnson, Carolyn	C.Jest (Johnson...	
Beck, Walter	03/02/20...	Warm	Not Attempted		\$1,164.94	\$48.00			7342286644	Residential S...	Johnson, Carolyn	C.Jest (Johnson...	
Martyn, Charles	03/02/20...	Warm	Not Attempted		\$5,011.76	\$192.00			7342289744	Residential S...	Johnson, Carolyn	C.Jest (Johnson...	
Martyn, Greg	03/01/20...	Warm	Not Attempted		\$1,164.94	\$48.00			7342289977	Residential S...	Johnson, Carolyn	C.Jest (Johnson...	
Moyer, Cheryl	02/15/20...	Warm	New Opportunity		\$2,385.00	\$35.00	carolyng@boldgr...		(734) 444-95...	Residential S...	Blais, Oliver	C.Jest (Johnson...	
Branch, Lee	02/15/20...	Warm	New Opportunity		\$1,164.94	\$48.00	carolyng@boldgr...		7345551212	Residential S...	Blais, Oliver	C.Jest (Johnson...	
Walsh, Marsha	02/14/20...	Warm	New Opportunity		\$1,482.94	\$35.00	carolyng@boldgr...			Residential S...	Blais, Oliver	C.Jest (Johnson...	

### Leads Kanban View

Not Attempted	Attempted	Contacted
<p><b>Chapman, Grace</b> (Warm)</p> <p>Open Amount: \$1,164.94   Open RMR: \$48.00</p> <p>Department: Residential Sales   Salesperson: Johnson, Carolyn</p>		
<p><b>Cunningham, April</b> (Warm)</p> <p>Open Amount: \$1,164.94   Open RMR: \$48.00</p> <p>Department: Residential Sales   Salesperson: Johnson, Carolyn</p>		
<p><b>Franklin, Gloria</b> (Warm)</p> <p>Open Amount: \$1,164.94   Open RMR: \$48.00</p> <p>Department: Residential Sales   Salesperson: Johnson, Carolyn</p>		