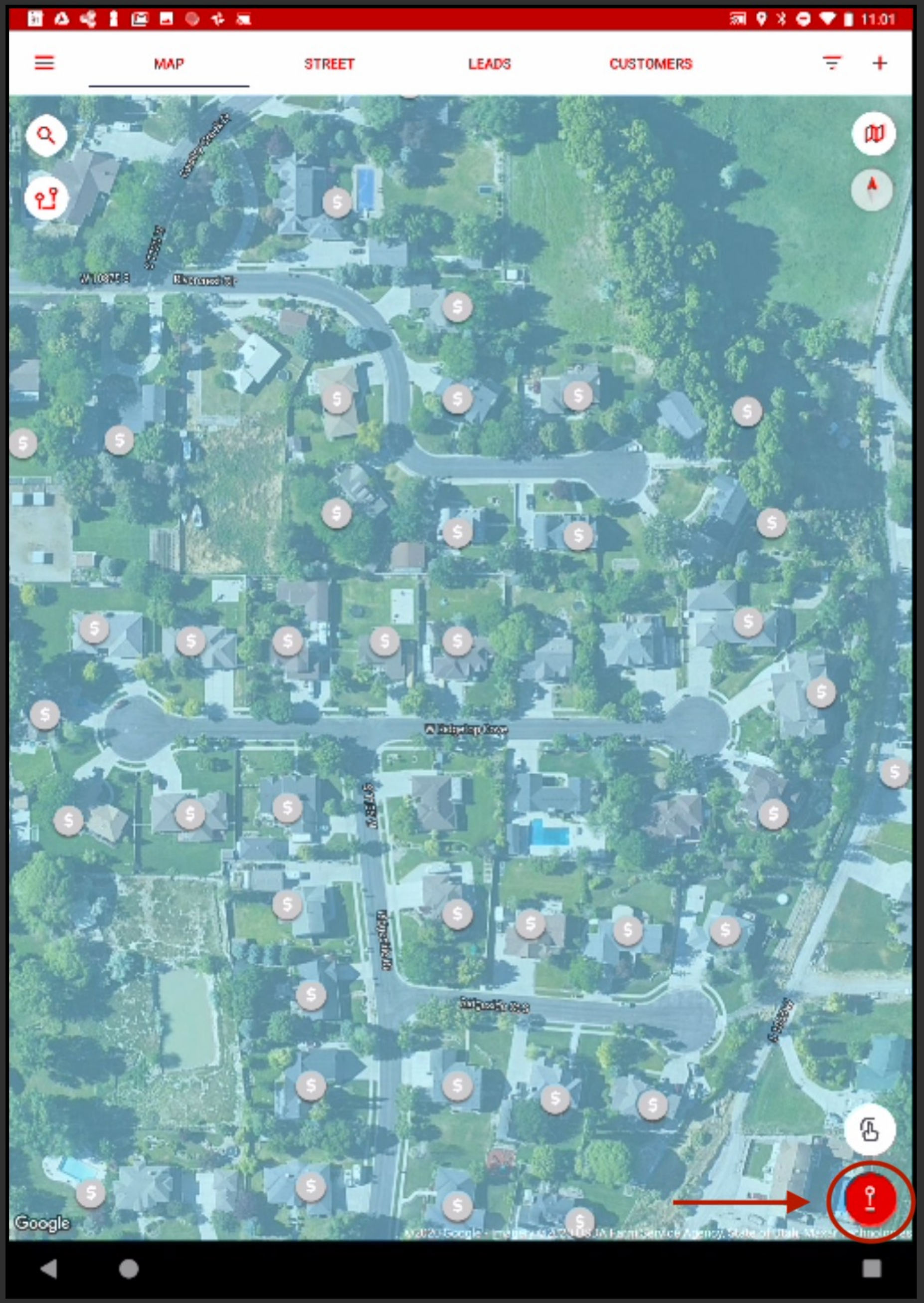
WEATHER
RESTORATION GROUP

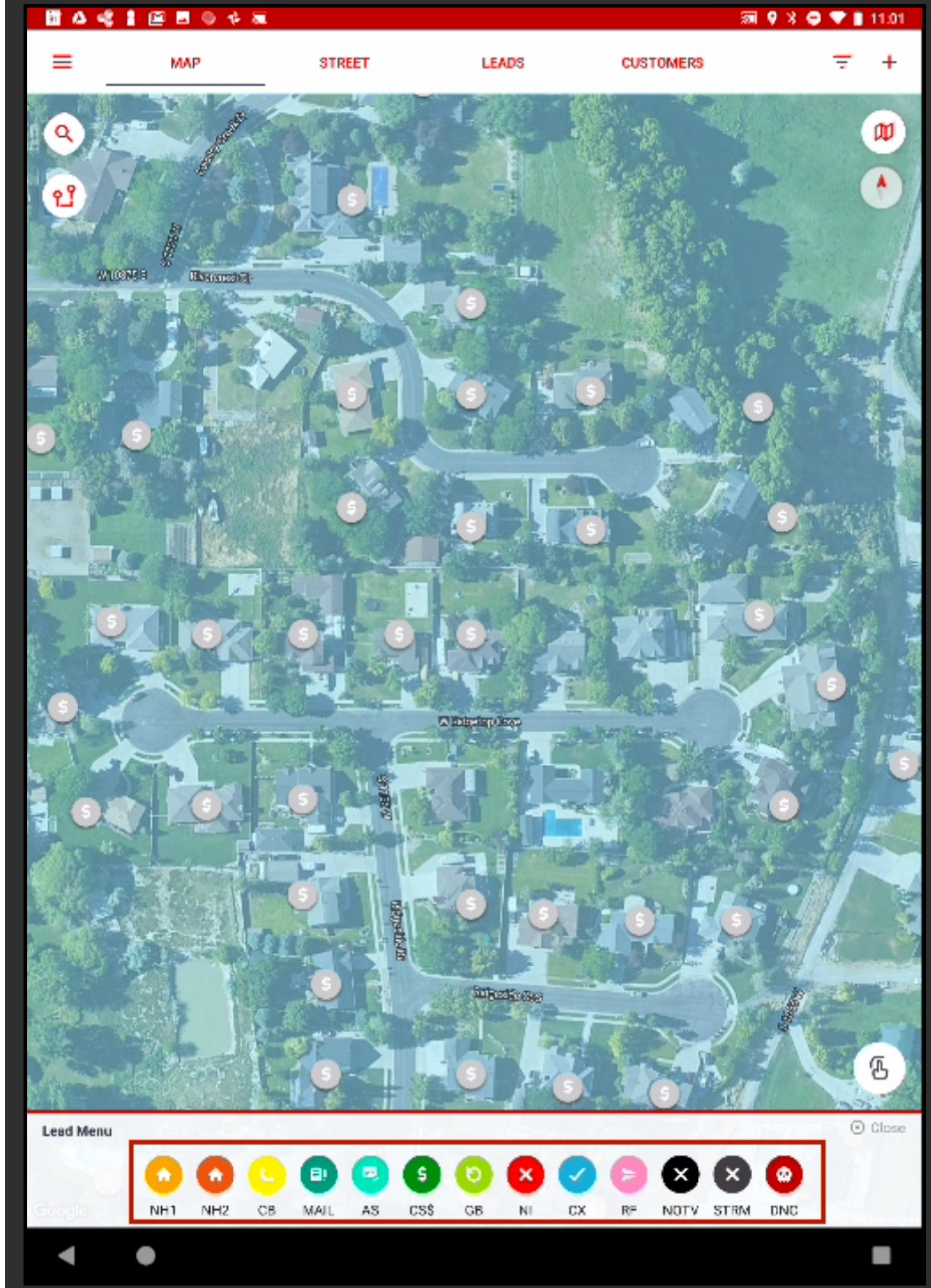
Sales Rabbit Training Manual

Creating and Editing Leads

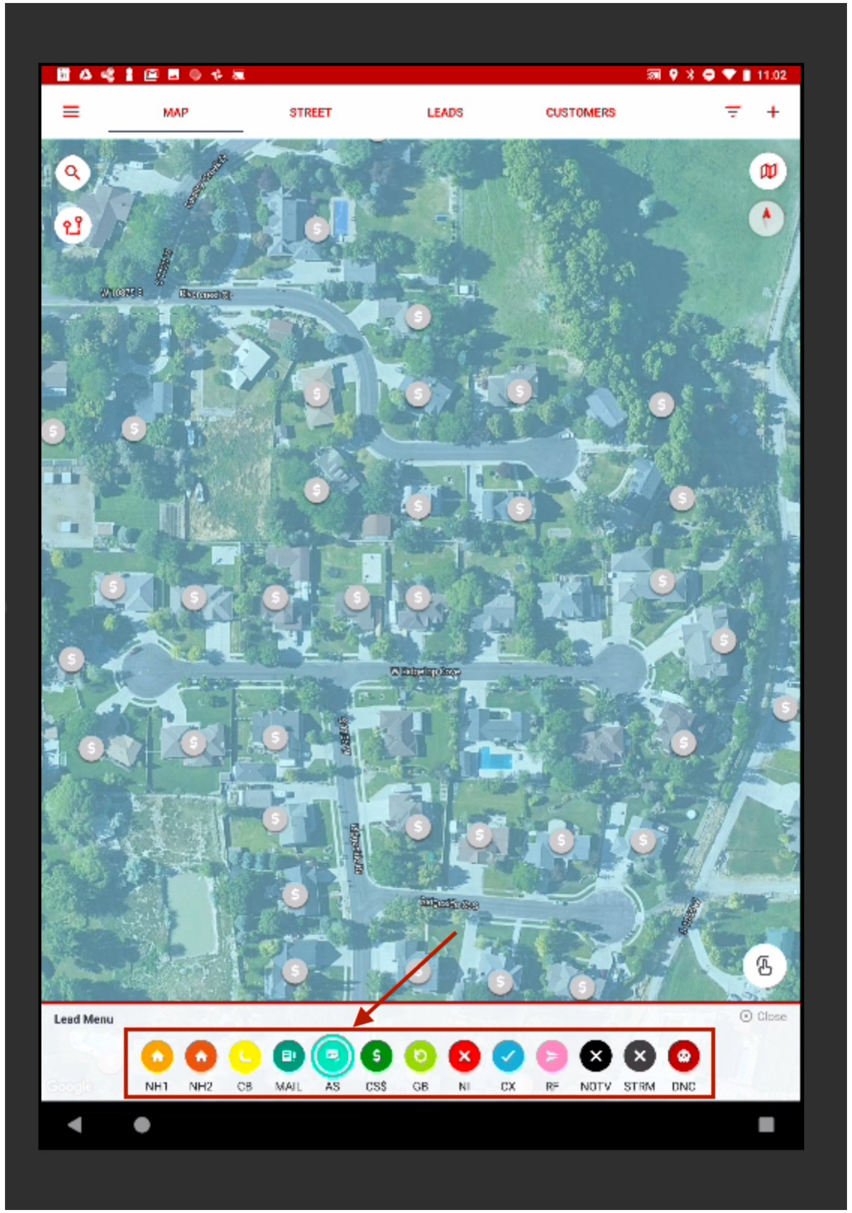
1) Click the pin icon in the lower right hand corner.



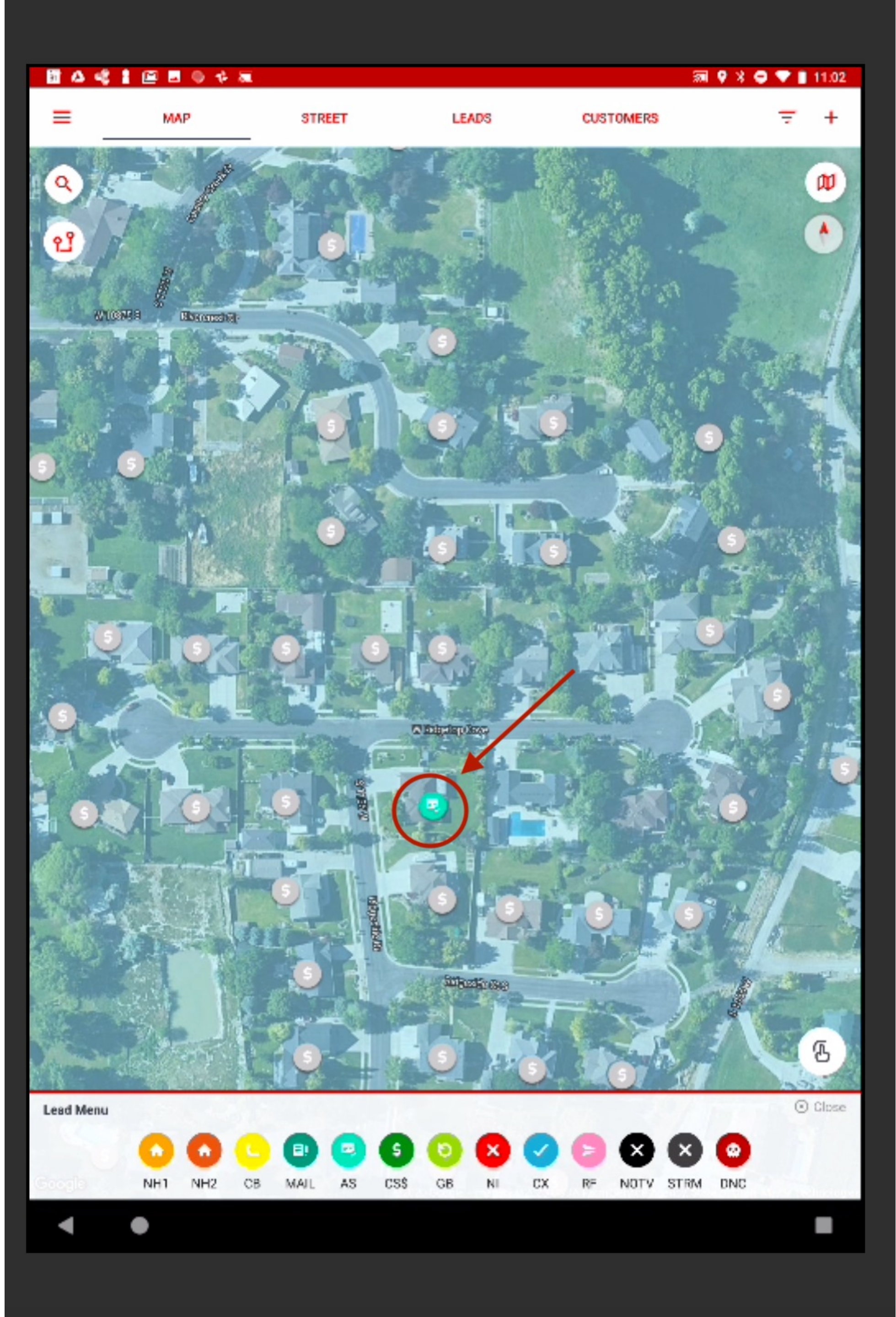
2) A Lead Status menu bar will appear at the bottom of the screen.

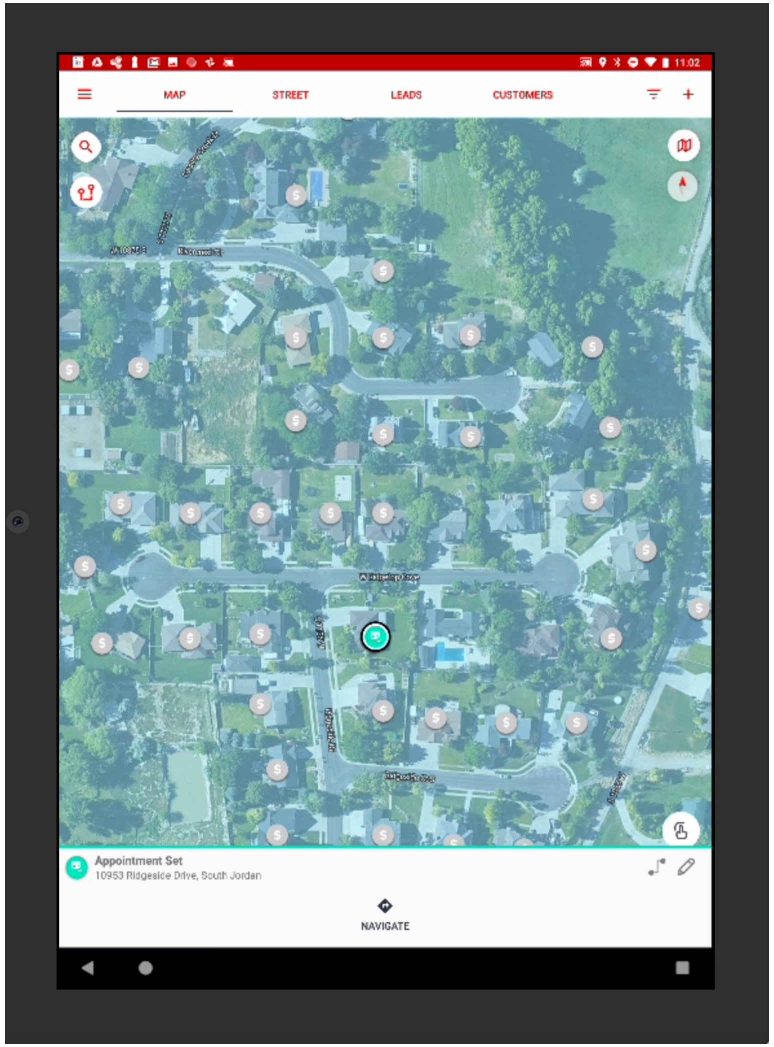


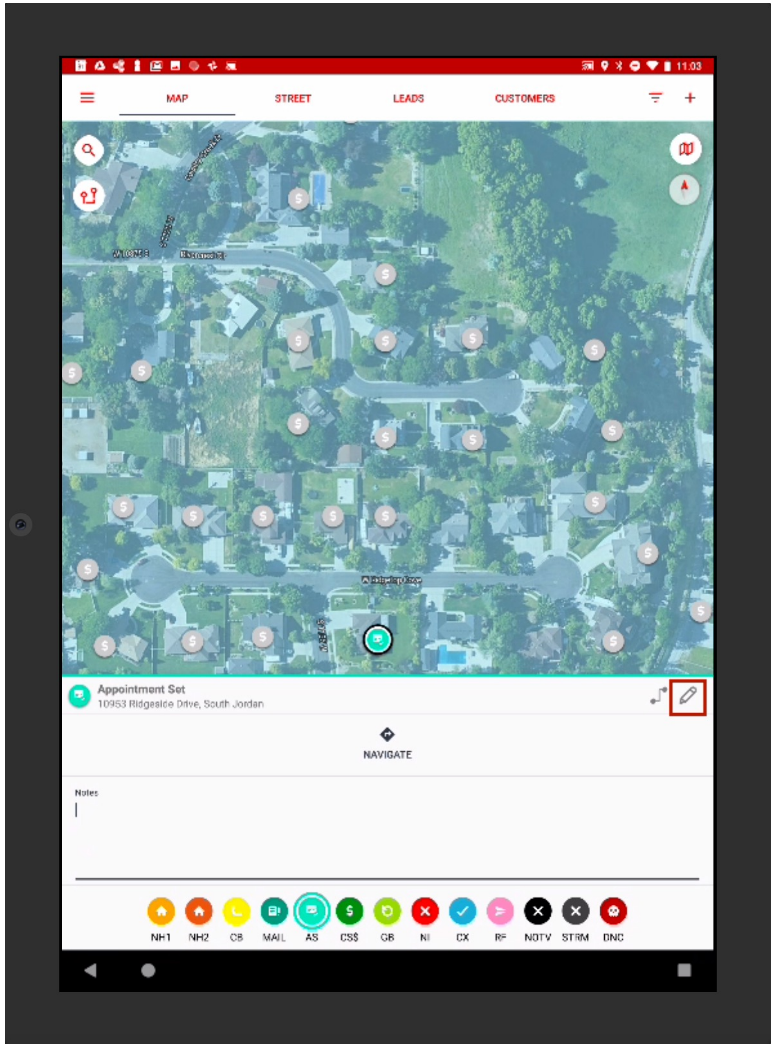
3) Click the appropriate Lead Status associated with the interaction. The menu bar will highlight the Lead Status with a circle around the selected status.



4) Touch the map directly where you want the Lead to be positioned.

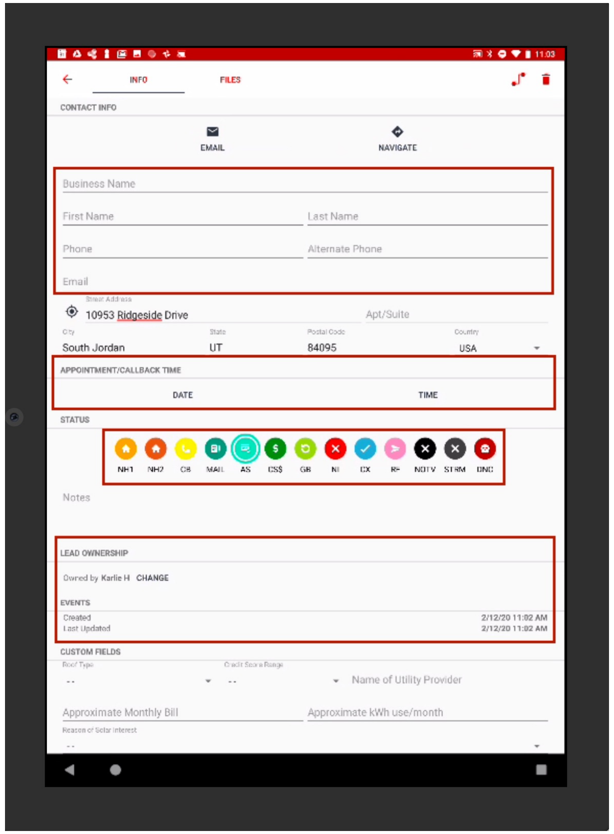


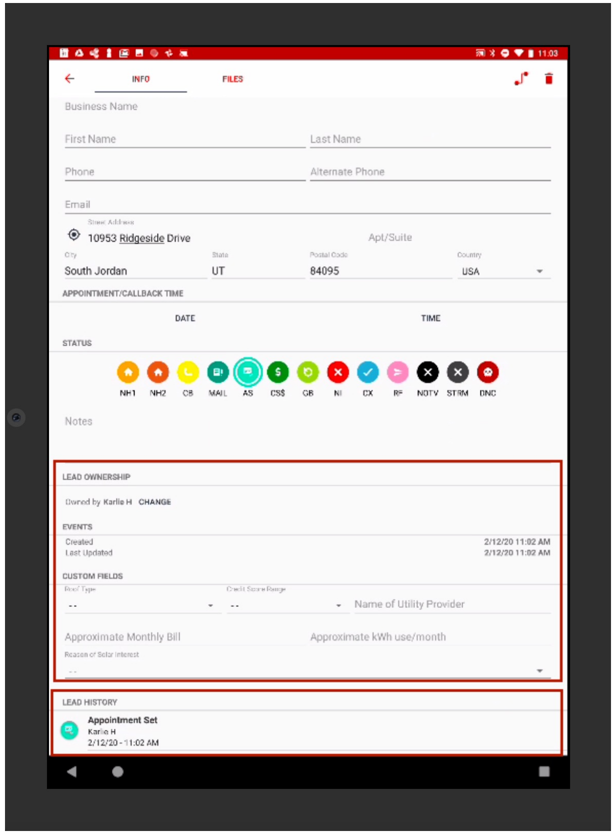




5) Click the Lead that was dropped on the map. A menu will appear on the bottom of the screen. Using your finger drag the menu up so "Notes" and Lead Statuses will be included in the menu. The pencil icon in the upper right hand corner of this pop up bar will allow you to go into the Lead Detail to add more information

6) The Lead Detail page will contain any information that may be added to the Lead.





How to use filters in Sales Rabbit