






How to Process Web Leads

Description

If your organization is set up to automatically create Prospects from a form filled out on your website, the Prospects will need to be processed and qualified.

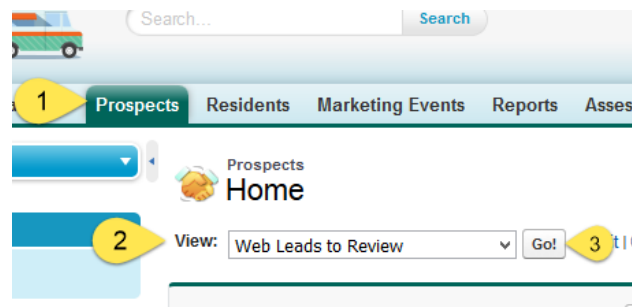
The system will:

-  Create a new Prospect profile
-  Check off the **Web Lead to Review** checkbox
-  Appear on the *Web Leads to Review* view on the Prospect tab
-  Send an email to the designated user to alert them to the new web lead
-  Create a “New Web Lead to Follow Up” Task for the designated user

Step by Step

Note: If you have received an email alerting you to a new web lead, you can view the new Prospect’s profile by clicking on the link in the email. Appropriate procedures also dictate that you should look at the *Web Leads to Review* view on the Prospect tab daily.

- 1** Navigate to the Prospect tab
- 2** In the **View** picklist, select *Web Lead to Review* and click **Go**

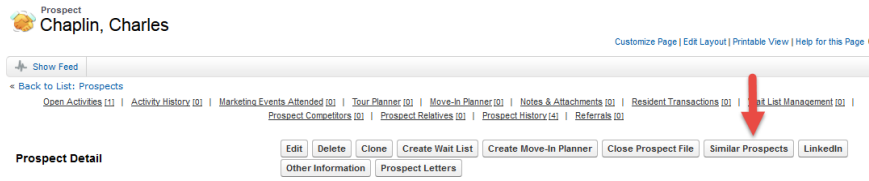


- 3** You will see a list of web leads that are ready to be reviewed

How to Process Web Leads

Prospects						
Web Leads to Review						
Action	Name	Prospect Status	Web_Lead_Created_c	Web Lead to Review	Web Comments	
<input type="checkbox"/>	Chaplin, Charles	Unqualified Unknown		<input checked="" type="checkbox"/>	Looking for a place for my...	
<input type="checkbox"/>	Fong, Fred	Unqualified Unknown		<input checked="" type="checkbox"/>		
<input type="checkbox"/>	Johns, Jill	Unqualified Unknown		<input checked="" type="checkbox"/>	Interest Retirement living...	
<input type="checkbox"/>	Ohaven, Lior (Lior Oha...	Unqualified Unknown		<input checked="" type="checkbox"/>		
<input type="checkbox"/>	Smith, Bill	Unqualified Unknown		<input checked="" type="checkbox"/>	Interested in retirement li...	
<input type="checkbox"/>	Thomas, Andy (Gladys...	Urgent Need ASAP		<input checked="" type="checkbox"/>		
<input type="checkbox"/>	Vince, Vincent	Resident		<input checked="" type="checkbox"/>		

- 4 Click on the **Name** of the Prospect you would like to review
- 5 Click the **Similar Prospects** button. This will search the system for Prospects, Inquirers, and Spouses with the same last name, phone number, or email address. If a duplicate file is found, use the original file and contact RHS Customer Success to delete the duplicate web lead profile.



Prospect: **Chaplin, Charles**

Buttons: Edit, Delete, Clone, Create Wait List, Create Move-In Planner, Close Prospect File, **Similar Prospects**, LinkedIn

- 6 You may now process the Prospect file by reviewing the information that has been imported from your web form. This may include the address, information about the Prospect's needs, and contact information.
- 7 Scroll down to the **Web Lead Information** section. Here, you will be able to view **Web Comments**, as well as other information that has been set up for your organization.
- 8 When the web lead has been processed, uncheck the **Web Lead to Review** checkbox

Web Lead Information	
Web Lead to Review	<input type="checkbox"/>
Landing Page	http://RHS.Community.Home.Page
E-Newsletter	<input checked="" type="checkbox"/>
Web Lead_Created_c	
Web Comments	Looking for a place for my mom. Hoping for a place that will care for her while allowing her to socialize.

- 9 Click **Save**