

#### How to Process Web Leads

# 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
- ${f 2}$  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



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Prospec	ts Residents	Marketing Events Rep	oorts Assessments	Incident Management	Scheduling	Invoice Approval	+			
•	Edit   Delete   Create New View									
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- 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.

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				Treases matery (4)   Noter		•	
Proceed Detail	Edit Delete	Clone	Create Wait List	Create Move-In Planner	Close Prospect File	Similar Prospects	LinkedIn

- 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.
- Scroll down to the Web Lead Information section. Here, you will be able to view WebComments, 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		Web_Referral_Linkc	https://na7.salesforce.com /a1W/e?retURL=%2Fa1WA0000001dmwK%3FsrPos%3D0%26srKp%3Da1V		
Landing Page	http://RHS Community Home Page	Web Sub-Tactic	Summer Event Ad		
E-Newsletter	✓	Web Best Day	Wednesday		
Web_Lead_Createdc		Web Best Time	3:00pm		
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