

Kanban – Leads

The prebuilt *Kanban – Leads* provides an overview of registered leads in your NetSuite account, with each Kanban column representing a lead status. The last two Kanban columns represents leads converted to prospects and records with the status *PROSPECT – Closed Lost* modified within the last month.

The screenshot displays the NetSuite Kanban - Leads interface. At the top, there is a search bar, a 'My Favorites' icon, and three priority filters: Priority 1 (green), Priority 2 (blue), and Priority 3 (purple). The main area is divided into four Kanban columns, each representing a lead status. Each column has a header with the status name, percentage, and count. Below the header, there are lead cards, each containing a sales representative's profile picture and name, followed by a list of fields: Sales Rep, Primary Contact, Category, Web Address, Phone, Address, LSA, Comments, and Status. The status field is highlighted in green.

Lead Unqualified (0%) (2)	Lead Qualified (10%) (5)	Convert to Prospect (20%) (3)	Closed Lost (0%) (1)
Ny Test AB Sales Rep: Rikard Burman Holmgren Primary Contact: Rikard Burman Holmgren Category: Web Address: Phone: Address: LSA: Comments: Status: LEAD-Unqualified	Anonymous Customer Swe Comp (new parent) Sales Rep: Caroline Norman Primary Contact: Caroline Norman Category: Web Address: Phone: Address: LSA: Comments: Status: LEAD-Qualified	Altview Sales Rep: Caroline Norman Primary Contact: Caroline Norman Category: Web Address: Phone: Address: Altview Gata 2 Solna 15444 Sweden LSA: 2/22/2017 Comments: Status: PROSPECT-In Discussion	Lead 3 Sales Rep: Rikard Burman Holmgren Primary Contact: Svenne Banan Category: Web Address: Phone: Address: LSA: Comments: Status: PROSPECT-Closed Lost
Nytt Lead2 Sales Rep: Rikard Burman Holmgren Primary Contact: Rikard Burman Holmgren Category: Web Address: Phone: Address: LSA: 2/27/2017 Comments: Status: LEAD-Unqualified	Christoffer Import Inc Sales Rep: Rikard Burman Holmgren Primary Contact: Rikard Burman Holmgren Category: Web Address: Phone: Address: LSA: 2/21/2017 Comments: Status: LEAD-Qualified	Lead 2 Sales Rep: Caroline Norman Primary Contact: Caroline Norman Category: Web Address: Phone: Address: LSA: Comments: Status: PROSPECT-In Discussion	
	Christoffer Import Inc : Christoffer test 2 Sales Rep: Rikard Burman Holmgren Primary Contact: Rikard Burman Holmgren Category: Web Address: Phone: Address: LSA: Comments: Status: LEAD-Qualified	Nytt Prospekt AB Sales Rep: Rikard Burman Holmgren Primary Contact: Rikard Burman Holmgren Category: Web Address: Phone: Address: LSA: Comments: Status: PROSPECT-In Discussion	

Kanban – Leads: Prerequisites

Before using the *Kanban – Leads* board, please make sure the prerequisites listed below are fulfilled in order for the board to function as expected.

1. Customer Status

Since the columns of the prebuilt *Kanban – Leads* board are based on NetSuite standard Customer status, it is important that the statuses presented in the board are available in your NetSuite account.

Navigate to Setup → Sales → Customer Statuses (Administrator) to find the list of Customer Statuses available in your NetSuite account. Compare the list from your NetSuite account with the Customer Status list which the prebuilt *Kanban – Leads* board is based on (picture below).

Customer Status List

<input type="checkbox"/> SHOW INACTIVES			
INTERNAL ID	CUSTOMER STATUS	STAGE	PROBABILITY
7	Qualified	Lead	10
6	Unqualified	Lead	0
14	Closed Lost	Prospect	0
9	Identified Decision Makers	Prospect	30
8	In Discussion	Prospect	20
11	In Negotiation	Prospect	75
10	Proposal	Prospect	50
12	Purchasing	Prospect	90
13	Closed Won	Customer	100
16	Lost Customer	Customer	0
15	Renewal	Customer	100

If the Customer Statuses differ between your NetSuite account and the picture above, you will need to edit the settings of the Kanban Columns for the *Kanban – Leads* board.

Please refer to the section ‘Kanban Columns’ in the ‘Kanban User Guide’

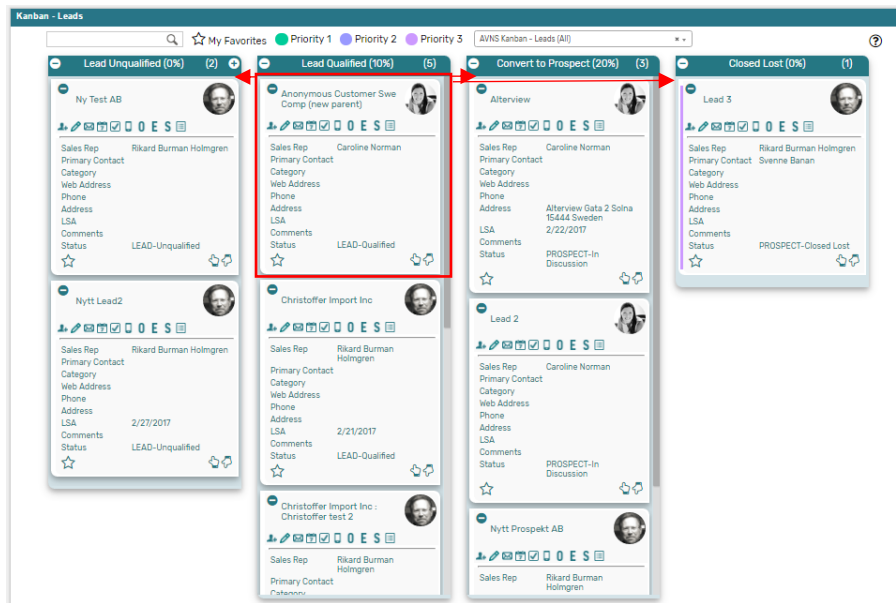
2. Sales Rep & Sales Rep Image

Make sure to mark the checkbox ‘Sales Rep’ on the Employee record for all available Sales Reps.

If an image has been uploaded to the *Image* field on the Employee record, this image will be displayed on the Kanban card. If no image is available, a predefined profile icon will be displayed instead.

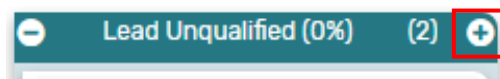
Kanban – Leads: Card Moves & Column Actions

The *Kanban – Leads* board contains four Kanban Columns. Each column has been configured with one or several Column Actions. Double clicking on any card in the *Kanban – Leads* board will open the lead record in edit mode.



1. Lead Unqualified (0%)

- Card Moves** – Kanban cards in the column *Lead Unqualified (0%)* can be moved to all other columns in the Kanban board.
- Column Actions** – when moving a Kanban card to the column *Lead Unqualified (0%)* the status of the record represented in the Kanban card will be updated to *LEAD – Unqualified* and the Sales Rep will be set to *@MySELF@* (Current User).
- Add Card** – it is possible to add a Kanban card (a new record) from the column *Lead Unqualified (0%)* by clicking on the + icon in the top right corner of the column.



2. Lead Qualified (10%)

- Card Moves** – Kanban cards in the column *Lead Qualified (10%)* can be moved to all other columns in the Kanban board.
- Column Actions** – when moving a Kanban card to the column *Lead Qualified (10%)* the status of the record represented in the Kanban card will be updated to *LEAD – Qualified* and the Sales Rep will be set to *@MySELF@* (Current User).

3. Convert to Prospect (20%)

- Card Moves** – Kanban cards in the column *Convert to Prospect (20%)* can be moved to all other columns in the Kanban board.
- Column Actions** – when moving a Kanban card to the column *Convert to Prospect (20%)* the status of the record represented in the Kanban card will be updated to *PROSPECT – In Discussion* and the Sales Rep will be set to *@MySELF@* (Current User).

4. Closed Lost (0%)

- Card Moves** – Kanban cards in the column *Closed Lost (0%)* can be moved to all other columns in the Kanban board.
- Column Actions** – when moving a Kanban card to the column *Closed Lost (0%)* the status of the record represented in the Kanban card will be updated to *PROSPECT – Closed Lost*.

Kanban – Leads: Available Card Actions

The Kanban cards in the *Kanban – Leads* board each contains ten Card Actions.

1. **Lead: New Contact**

Add a new contact to the lead from the Kanban card.

2. **Lead: New Note**

Add a new note to the lead from the Kanban card.

3. **Lead: New Email**

Add a new email to the lead from the Kanban card.

4. **Lead: New Event**

Add a new event to the lead from the Kanban card.

5. **Lead: New Task**

Add a new task to the lead from the Kanban card.

6. **Lead: New Phone Call**

Add a new phone call to the lead from the Kanban card.

7. **Lead: New Opportunity**

Add a new opportunity to the lead from the Kanban card.

8. **Lead: New Estimate**

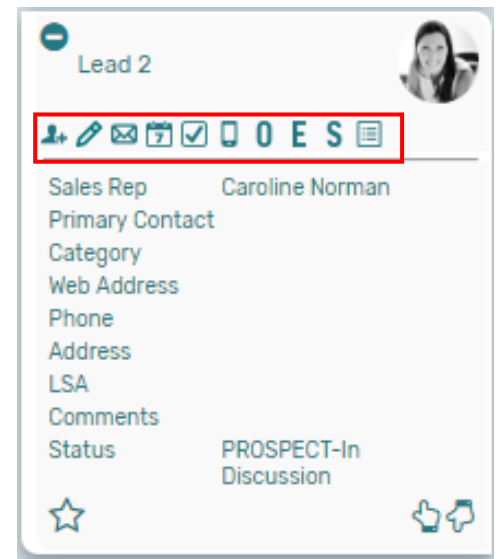
Add a new estimate to the lead from the Kanban card.

9. **Lead: New Sales Order**

Add a new sales order to the lead from the Kanban card.

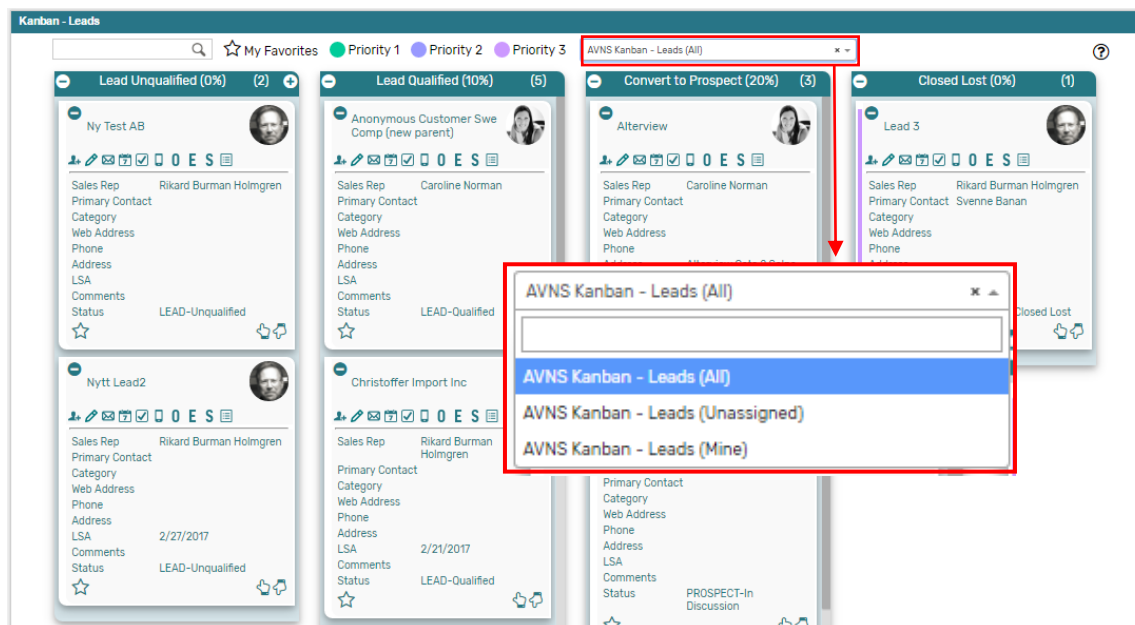
10. **Lead: Show Activity**

Show a list of all activities related to the lead from the Kanban card.



Kanban – Leads: Alternative Searches

There are three alternative searches for the *Kanban – Leads* board.



1. **AVNS Kanban Leads (All)**

This search will display all registered leads in the *Kanban – Leads* board.

2. **AVNS Kanban Leads (Mine)**

This search will display registered prospects where Sales Rep is *Mine* (current user) in the *Kanban – Leads* board.

3. **AVNS Kanban Leads (Unassigned)**

This search will display registered prospects without an assigned Sales Rep in the *Kanban – Leads* board.

Kanban – Leads: Available Colors

There are three colors available for the *Kanban – Leads* board, which can be used to highlight and filter the Kanban cards (*Priority 1 // Priority 2 // Priority 3*). These are defined in the *Color* subtab of the Kanban configuration record.

