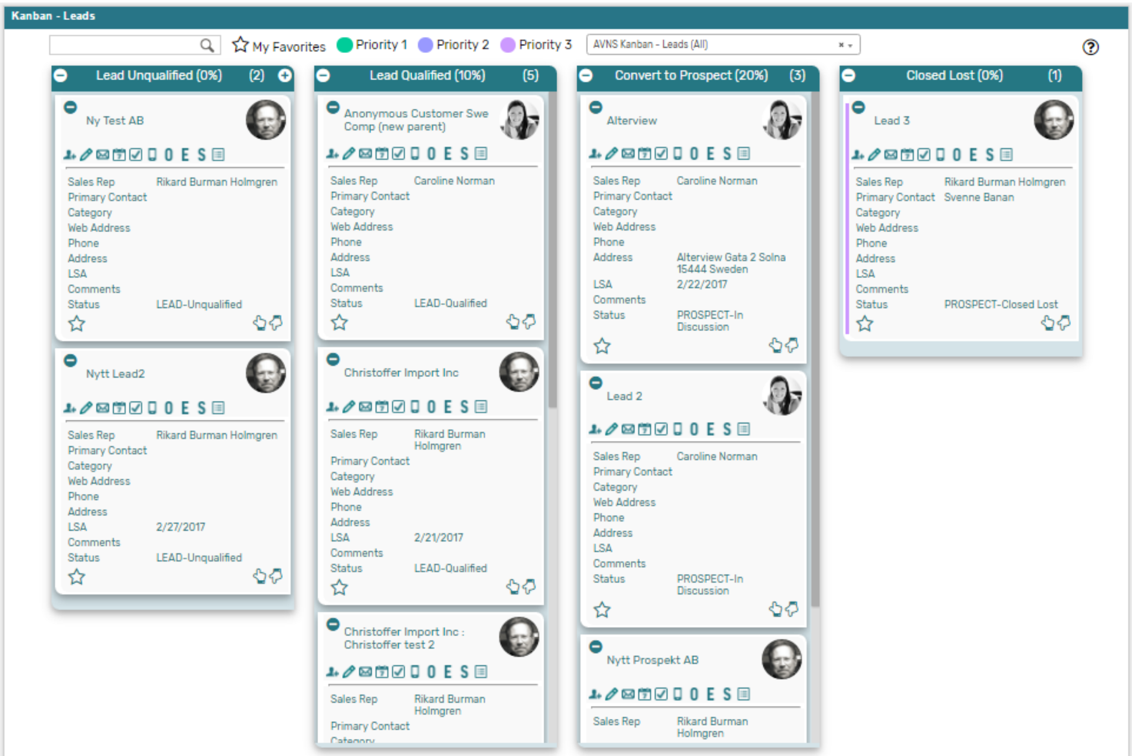
Kanban – Leads

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.



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

   New | Refresh

   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

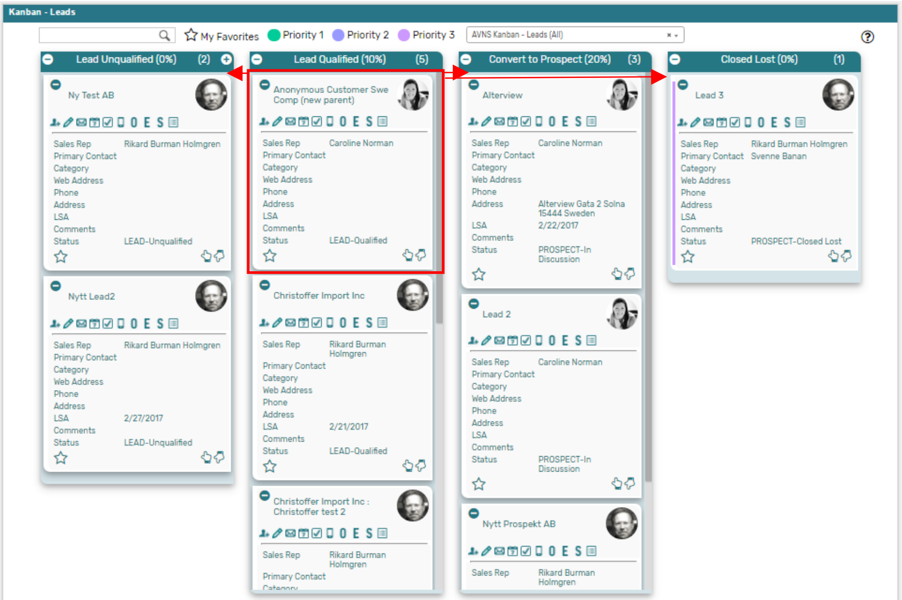
   If the Customer Statuses differ between your NetSuite account and the picture above, you will need to edit the settings of the Kanban Columns for the *Kanban – Leads* board.
   Please refer to the section 'Kanban Columns' in the 'Kanban User Guide'

2. **Sales Rep & Sales Rep Image**

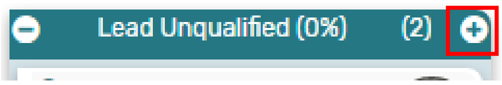
   Make sure to mark the checkbox 'Sales Rep' on the Employee record for all available Sales Reps.
   If an image has been uploaded to the *Image* field on the Employee record, this image will be displayed on the Kanban card. If no image is available, a predefined profile icon will be displayed instead.

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%)**
   a. *Card Moves* – Kanban cards in the column *Lead Unqualified (0%)* can be moved to all other columns in the Kanban board.
   b. *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).
   c. *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.



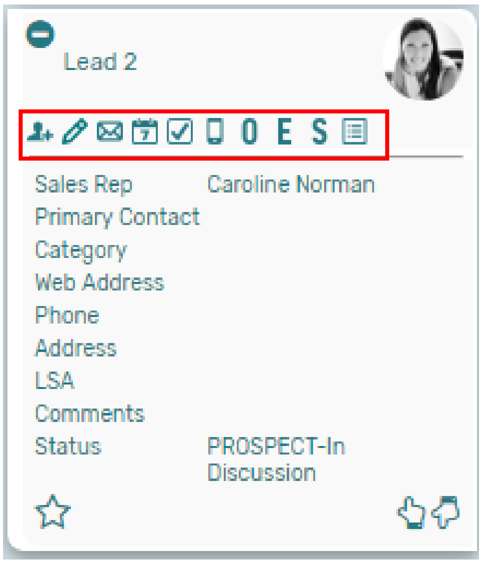
2. **Lead Qualified (10%)**
   a. *Card Moves* – Kanban cards in the column *Lead Qualified (10%)* can be moved to all other columns in the Kanban board.
   b. *Column Actions* – when moving a Kanban card to the column *Lead Qualified (10%)* the status of the record represented in the Kanban card will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

3. **Convert to Prospect (20%)**
   a. *Card Moves* – Kanban cards in the column *Convert to Prospect (20%)* can be moved to all other columns in the Kanban board.
   b. *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%)**
   a. *Card Moves* – Kanban cards in the column *Closed Lost (0%)* can be moved to all other columns in the Kanban board.
   b. *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

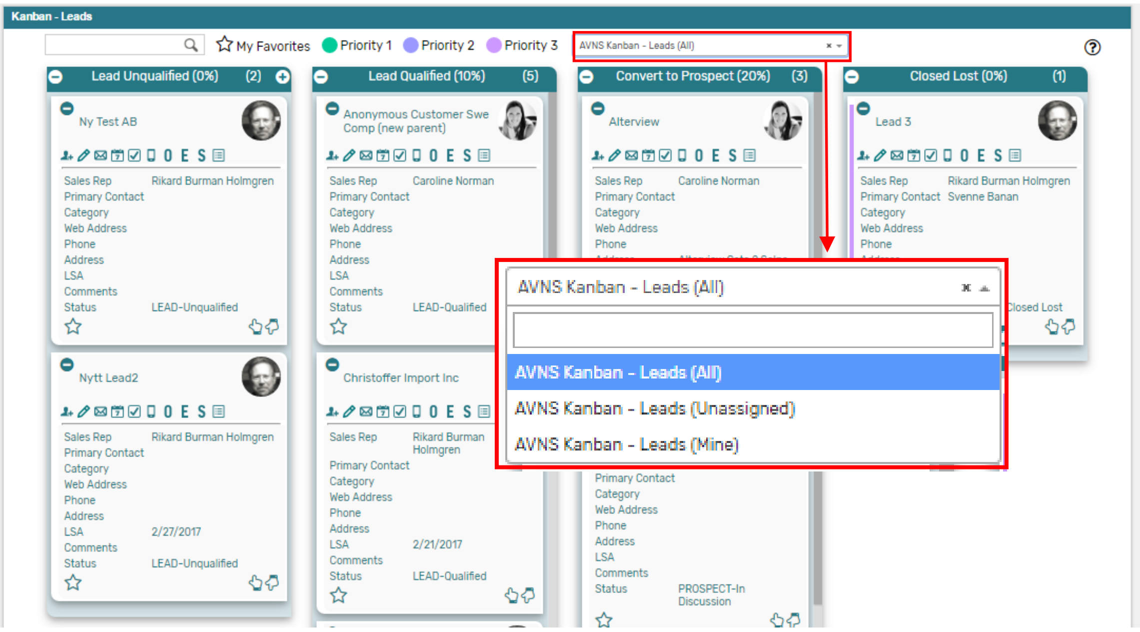
The Kanban cards in the *Kanban – Leads* board each contains ten Card Actions.



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.