Leads Module

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# Overview

Efficiently oversee your leads and seamlessly transform them into clients right from the portal. Opting for the custom enrollment page with the Vitafy portal allows your clients to conveniently register for your services, while the leads module ensures tracking for a comprehensive overview of your client acquisition process.

## Placeholder image

## Leads Tracking

Leads from the enrollment page will automatically update in the portal or leads can be created manually.

Leads Conversion

All leads, despite of their status, can be converted to clients which will move them to the [clients](https://docs.google.com/document/u/0/d/1U56J66Q1uRzs3DVkURMmQuJKaOeLYn1FhTZIQinRE7c/edit) list.

# How To

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**Automated** **leads:**

With a personalized enrollment page through Vitafy, the leads module ensures automatic updates for clients who have partially filled out the enrollment form. This feature allows for seamless tracking and management of partial leads, providing a comprehensive view of potential clients in the system.

**Manually create leads:**

In case you don’t have a customized enrollment page with Vitafy, you can manually enter your leads to track within the Vitafy portal. To manually create a lead:

* Goto +Add button on the top right > Choose Individual or Group
* This allows you to record which individual/company client is referred by and what their lead status is.

**Change lead status:**

To change lead status use the dropdown under the leads column and choose from the different status options:

* Declined
* On Hold
* In Progress
* New
* Attempted To Contact
* Inactive
* Partial

Note: Lead status cannot be modified for leads automatically imported from the enrollment page and can only be modified for leads added manually.

**Convert leads to clients:**

Leads can be filtered using the search bar by name, status or type. All client leads can be converted to clients. Locate the client you would like to convert:

* Goto the ellipses on the far right of the lead > choose Convert to Client.

**Edit/Delete leads:**

To edit or delete an existing lead, use the ellipses on the far right of the client lead and choose edit or delete accordingly.

Note: Automatic leads imported from the enrollment page cannot be deleted.

**Lead notes:**

Enhance your client lead management by adding notes through the "Add Note" button located beside the specific lead you wish to annotate. This feature ensures that you can easily capture and organize essential information, providing a comprehensive and personalized approach to lead tracking.

**Export leads:**

To export the list of leads, simply click the export button located in the top right corner.