



BY REPRESENTATIVE

Last updated 06/15/2015

BY STATUS

Avatar/initials in circle

Can filter to see by rep or status

Can accept or reject

In Progress accordion open on launch; all other accordions would be closed

In Progress can be filtered

Status shown by icon also (far left)

NEW (2) Potential Customer Name Product of Interest

Potential Customer Name Product of Interest

Assign Lead

Assign Lead

Reject Lead

Reject Lead

IN PROGRESS (3)

All

Accepted

Pending

Rejected

FINANCIAL REP NAMEHERE

Potential Customer Name

Product of Interest

Assigned to FRName Here ✓ Lead Accepted

06/07/2015 06/07/2015

Reassign Lead







FINANCIAL REP NAMEHERE

Potential Customer Name

Product of Interest

Assigned to FRName Here

06/06/2015

Lead Pending









FINANCIAL REP NAMEHERE

Potential Customer Name

Assigned to FRName Here

Product of Interest

06/04/2015 06/09/2015



X Lead Rejected





Not accepting new customers

FINANCIAL REP NAMEHERE

Potential Customer Name

Product of Interest

▼ CONVERTED (2)

Assigned to FRName Here Converted

06/14/2015

06/07/2015





## Potential Customer Name

FINANCIAL REP NAMEHERE

Product of Interest

Assigned to FRName Here

Converted

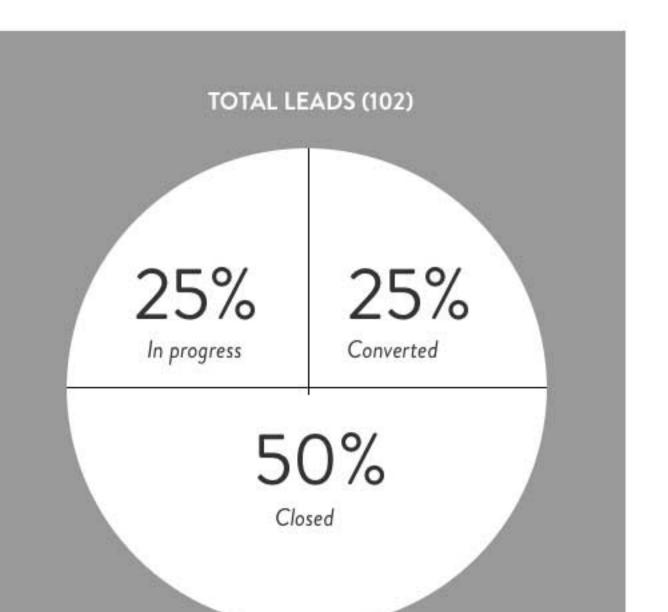
06/04/2015

06/11/2015





▲ CLOSED (83)



Can reassign, launch email, launch the phone and open a note field (on left slightly down)