



“Sales Channel Optimization”

Lead Email Body

Dear Distributor,

You have a new Sales lead forwarded by **Scott Volk** from Dorner.

[Click Here](#) to access your lead.

Comment on Lead :

[Need Help?](#) Click to report any problems.

Sincerely,
Lead Management Team
Dorner

*Leads will arrive in your email and can be accessed via
PC, tablet or mobile device*



Lead Interface

- *Simple email update process requires no logins*
- *Simply update on status and submit*

The screenshot displays a 'Hot Lead' interface for DORNER. The lead is dated 16 Feb 2018 and is associated with the website 'Contact Us' for Chris Lackey. The contact email is clackey@beckman.com. The interface includes a link to see all possible matches, the company name Beckman Coulter, and the address 2040 Enterprise blvd, West Sacramento, CA, USA, 95691. The website www.beckman.com is listed, along with two phone numbers: 916-425-3345 and 916-374-3511. The SIC code is 3826 - Laboratory Analytical Instruments, and the NAICS code is 334516 - Analytical Laboratory Instrument Manufacturing. The lead is categorized as 'Analytical instruments, nsk' and is noted as a demo lead. At the bottom, there are buttons for 'Forward', 'Open', 'Close', 'Not My Lead', and 'Support'. The interface is powered by Interlynx.

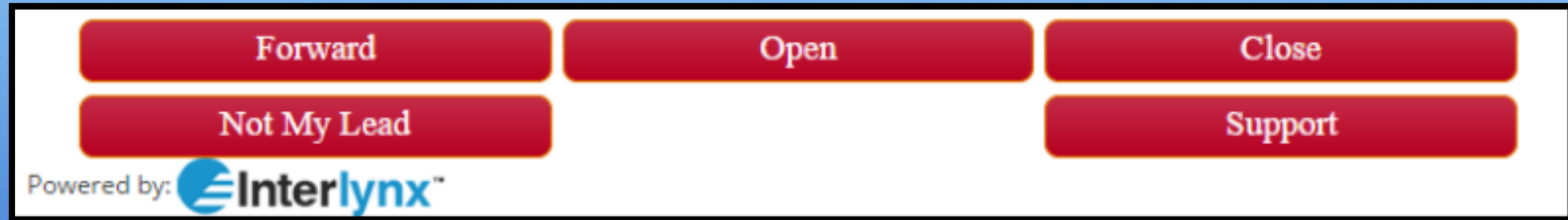
	16 Feb 2018
	Website - Contact Us
	Chris Lackey
	clackey@beckman.com
	Click here to see all possible matches.
	Beckman Coulter
	2040 Enterprise blvd, West Sacramento, CA, USA, 95691
	www.beckman.com
	916-425-3345
	916-374-3511
	3826 - Laboratory Analytical Instruments
	334516 - Analytical Laboratory Instrument Manufacturing
	Analytical instruments, nsk
	This is a demo lead.

Forward Open Close
Not My Lead Support

Powered by: Interlynx™

Interlynx

Posting Options



..FEEDBACK.. you can post the lead by using these posting options.

Forward the lead to a Sales Person

The image shows a web application interface. On the left, there is a 'Sales Person' dropdown menu with the following options: 'Select Sales Person' (highlighted in blue), '--Add New Contact', '--Delete Contact', and '--Edit Contact'. Below the dropdown are two red buttons: 'SUBMIT' and 'CANCEL'. On the right, a modal dialog titled 'Add New Sales Person' is open. It contains two input fields: 'Contact Name' and 'Contact Email'. Below these fields is a red 'ADD' button. A red 'X' icon is in the top right corner of the modal.

Send lead to the appropriate sales person to report back on

Take Action on Lead

Close Status

Select Close Status *

- Select Close Status
- Order
- Good Lead
- Low Quality Lead
- Unable to Reach Customer

SUBMIT **CANCEL**

...CLOSE – Report back on the lead status. Select from ORDER, GOOD LEAD, LOW QUALITY LEAD and UNABLE TO REACH CUSTOMER...



Close Status
Order ▼ *

Order Value
*
Enter the rounded amount of Order. Do not use symbols or commas.

Product Group
Select ▼

Customer Type
Please Select ▼


Additional Comments

SUBMIT **CANCEL**


...ORDER- If you get order on the lead you can select the part and put the order amount..



Reason

Select One  *

Remind Me After

 *

Select the time period for a reminder to be sent for this lead before posting.

Additional Comments

SUBMIT **CANCEL**

Keep “OPEN”

- *If you are working on the lead and it is being followed up on*
- *This will not close the lead*
- *A reminder will be sent on the day you have indicated*

Select Reason

Order

This Customer Needed Information Only

This Customer Needed Service Or Repair Only

Sent Quote To Customer - Did Not Purchase

This Is A Good Customer - No Follow Up Required

Budgetary Quote Only - No Follow Up Required

Engineering Firm - Specification Need Only

This Customer Purchased A Different Type Of Product

Unable To Meet Customer Requirements

Purchased From Competitive Manufacturer

Purchased From Competitive Distributor

I Have Already Reported Back On This Lead Through The System *

Other - Please Enter The Reason In The Box Below *

Select Reason ▼ *

Additional Comments

SUBMIT **CANCEL**

GOOD LEAD

- *The lead had a good potential to generate business*
- *The lead opens a door for potential future new business*
- *Represents a key customer or market*
- *This will close the lead and no reminder will be sent.*

Select Reason

- This Customer Is Trying To Sell Us Something
- We(l) Have Already Received This Lead From Your System And Responded
- We(l) Have Already Received This Lead From Another Source And Responded
- The Lead Information Is Insufficient Or Incorrect
- This Lead Is Now Old And No Longer Good
- This Customer Did Not Request Information
- This Is A Competitive Distributor
- This Is Someone From Our Company
- This Customer Has Bad Credit
- This Lead Is Not For Us(me)
- Other - Please Enter The Reason In The Box Below

Select Reason ▼ *

Additional Comments

SUBMIT CANCEL

LOW QUALITY LEAD

- *The lead had no potential*
- *Select a reason from the dropdown menu*
- *This will close the lead and no reminder will be sent.*

Reason

Select Not My Lead ▼ *

Select Not My Lead

My Company Is Not Authorized To Sell In This Territory

Project Not In My Company's Territory

Other - Please Enter The Reason In The Box Below

SUBMIT CANCEL

NOT MY LEAD

- ***The lead does not belong to your territory***
- ***This will close the lead and no reminder will be sent.***
- ***Lead will be re-routed accordingly***

Quick Tips

- Process leads immediately
- Keep leads inside system!
 - Do not “forward” leads in outside email
 - Do not “copy/paste” into Excel files
 - If the lead went to the wrong please, send them back in for reprocessing.
- Use “Open” if you need time to decide
- Review your weekly (Monday) reports



Thank You for joining us today!

For any questions email us at: support@dorner-interlynx.com

