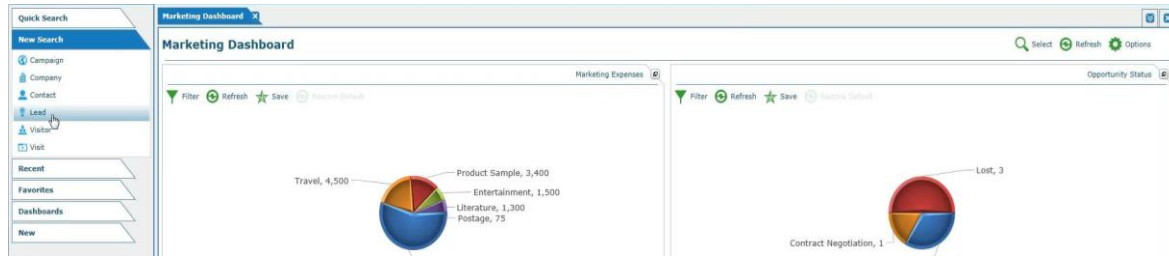
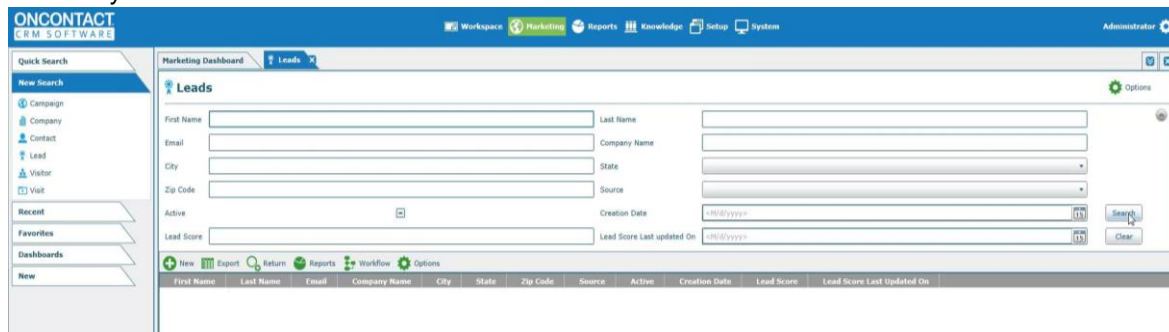


Lead Search-Manage Leads

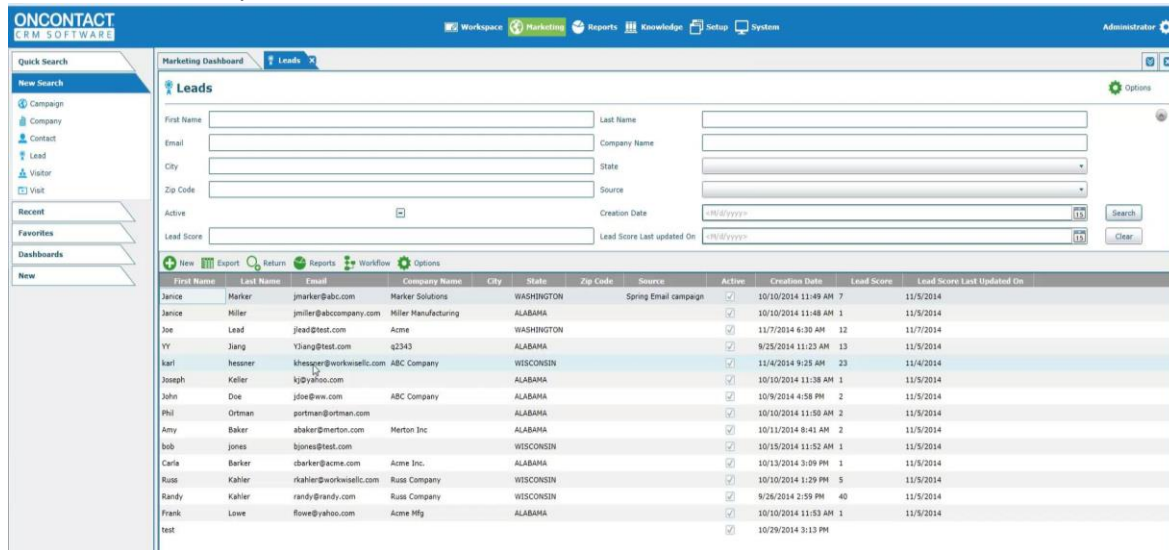
1. Left Click Marketing and New Search, and select Lead.



3. Enter your Search criteria and click Search.



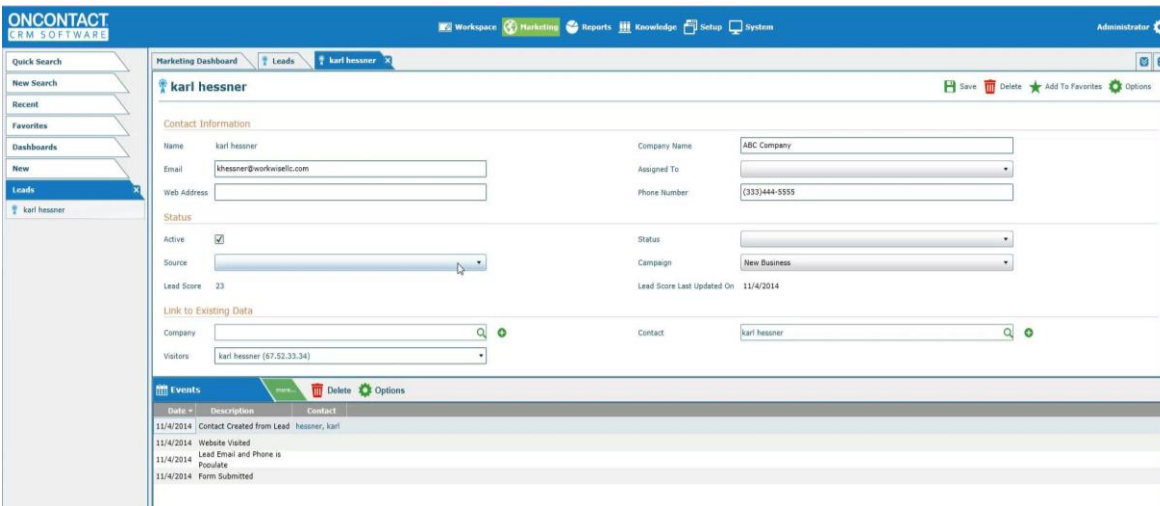
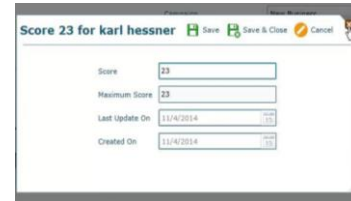
4. Double Click to open a Lead.



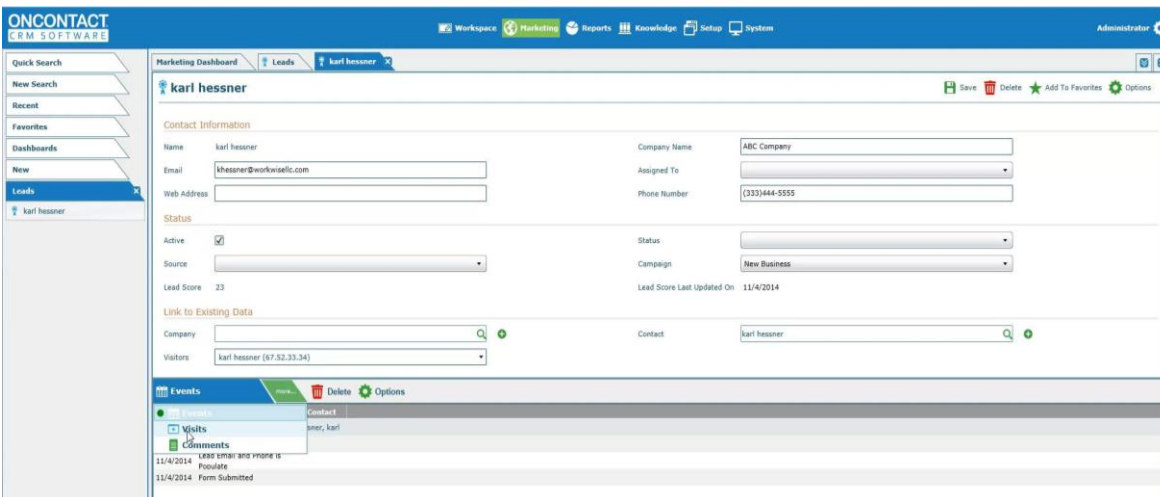
Lead Search-Manage Leads

5. The Lead record is displayed, including the Events that were captured. Fields include:

- **Source:** Identifies the Source- Examples: Tradeshow, Print Mailing, Email Campaign
- **Lead Score:** OnContact can calculate a score for this lead based on a number of various Event criteria. You can also click this score to open a dialogue box and manually adjust the score yourself. See screenshot here.
- **Status:** Lead's Status – Ex: Active, Bad Data, Inactive
- **Campaign:** Optionally link this Lead to a Campaign.
- **Contact:** Link this Lead to an existing Contact, or click the green Plus icon to add this Lead as a Contact.
- **Events Tab:** Displays the Events that are tracked as the Lead interacts with pages on your website. You can assign your own score for each event (In Setup, Communication, Event Type), or use the default scoring provided with OnContact.



6. Left Click to select the Visits tab.



Lead Search-Manage Leads

7. Left Click the Plus sign to expand the visitor's data.

- *Note: This data is collected by using Tracking Code. In Setup, under Campaign, you will find a string of HTML code to embed on the pages in your site that you want to track.*

The screenshot shows the ONCONTACT CRM Software interface. The 'Leads' tab is selected for the lead 'karl hessner'. The 'Visits' section is collapsed, displaying a summary table:

Visitor	Creation Date	Session Title
karl hessner (67.52.33.34)	11/4/2014 9:20 AM	karl hessner (67.52.33.34) - 11/4/2014 9:20:54 AM
karl hessner (67.52.33.34)	11/4/2014 9:21 AM	karl hessner (67.52.33.34) - 11/4/2014 9:21:58 AM
karl hessner (67.52.33.34)	11/4/2014 9:22 AM	karl hessner (67.52.33.34) - 11/4/2014 9:22:09 AM

8. The Visits tab displays the date/time for each visit, the Page name and duration on the page.

The screenshot shows the ONCONTACT CRM Software interface with the 'Visits' section expanded. The detailed table of visits is as follows:

Creation Date	Page	Duration	Description	Referrer
11/4/2014 9:20 AM	Test Form - OnContact	00:00:33		
11/4/2014 9:21 AM	CRM and CRM Software Products OnContact Software	00:00:13		http://oncontact.spengine.com/test-form/
11/4/2014 9:21 AM	CRM FAQ Frequently Asked Questions OnContact Software	00:00:03		http://oncontact.spengine.com/crm/
11/4/2014 9:21 AM	CRM and CRM Software Products OnContact Software	00:00:03		http://oncontact.spengine.com/crm-customization-tools/
11/4/2014 9:22 AM	Test Form - OnContact	00:03:23		http://oncontact.spengine.com/test-form/

Record 1 of 3 Total Count: 3