

Sales Pipeline - Creating and Editing Leads

To be able to create leads, you must first maintain the lead definition. If you have questions about this, go to the [Tasks & CRM](#) section.

You create leads under Sales Pipeline - Leads with the green + "Create a new lead definition".



Sales-Pipeline \ **Leads**

Übersicht und Bearbeitung von Leads

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Bezeichnung

2

Gültig ab



3

Gültig bis



4

Kunden



5

CRM Konfiguration



6

Kampagne



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Status



1. Choose a meaningful Name
2. Specify the validity period
3. Assign the previously selected [Customer list](#)
4. Assign the previously created [CRM Configuration](#)
5. If a Campaign is to be linked, assign the [Campaign](#) here
6. Set the [Status](#)

Edit Lead Definitions afterwards

To do this, click on an existing definition and you can change the pre-filled fields. However, note that this could distort the evaluations.

Email Templates

In the Assistant step "Email Templates" you select via checkbox which centrally maintained email templates (see [Settings - Email Templates \(Opportunities & Leads\)](#)) are available in the client for this lead definition. Only activated templates are selectable in the "Email" widget in the client. From version 21 onwards.

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