Lightspeed CRM Best Practices:

CRM in EVO System Alerts, Desktop, and Leads Quotes and Deals

Key Setups to get the most out of your CRM in Lightspeed EVO. Never miss an incoming Lead by utilizing System Alerts, Desktop Widgets and customizing your Leads Quotes and Deals Screen.

System Alerts – will send an alert through Lightspeed EVO, Email and/or Text when follow ups are due or Leads have been assigned or other triggers from different modules in Lightspeed EVO.

- System Alerts are enabled in the Lightspeed User's Security.
- Email address and phone numbers must be in the Lightspeed User's Security Account
- System Alerts are sent through the **Store Communication Account**. It must be activated for email and/or texting to send alerts. *<u>Store Account sends System Alerts, not Individual or Group.</u>*
- After setup in Security and Store Communication Account, System Alerts are turned on by the user in their personal login through System – System Alerts. *<u>This must be done on each</u> <u>individual login.</u>*
- Best Practices Recommends
    - Follow Up – will notify you when a follow up is coming due
    - Salesperson Assignment – will notify you when you have been assigned a Lead Manually or by Internet Lead auto assignment.

Desktop Widgets – widgets that will show Follow ups, Daily Calendar, Leads, etc., on one screen

- Desktop Widgets are enabled in the Lightspeed User's Security.
- Managers can determine access to different Desktop widgets in the Lightspeed User's Security
- After Desktop is set up in the Lightspeed User's Security, Desktops are enabled by the Lightspeed User in their personal login through System – Desktop. *<u>This must be done on each</u> <u>individual login.</u>*
- Best Practices Recommends for Salespeople
    - Daily Calendar
    - Open Follow Ups
    - Completed Follow up
    - Internet Leads
    - Lead by Source

Leads Quotes and Deals Screen – can be modified to show different items and then can be sorted and searched easier.

- Open you Leads Quotes and Deals Screen. Right click on the dark blue header row.
- Customize your columns with the items you want to see on your screen by checking the boxes in the drop-down menu.
- Best Practices Recommends
    - Deal Date – this is the date the Lead came into EVO
    - Source
    - Stage Name
    - Last Follow up
    - Next Follow up
- You can sort by any column by clicking on the blue header for that column.
    - <u>It is recommended to always sort by **Deal Date** with the newest Leads at the top.</u>

For further assistance, use LS Get Help portal or call 1-800-521-0339.