TOASTMASTERS LEAD MANAGEMENT (TLM) |QUICK REFERENCE GUIDE

LOGIN

For optimal functionality use Firefox or Chrome browsers. The TLM does not function in Safari or Internet Explorer. It is also recommended to clear your browser's cache and cookies on occasion. Do not login using "Sign in with Google."

Visit www.insightly.com and enter the credentials used when you first set up your TLM account. Remember to set your notification preferences and sync your email upon the first login (this step is to be completed only once).

VIEW LEADS

To access your district's lead records, select **Leads** in the left navigation bar then select your preferred List View.

- LIST VIEW: From the drop-down menu in the top left toolbar, select a **List View.**
  - Options: All Leads, All Open Leads, All Closed Leads, My Leads, etc.

- DISPLAY SETTING: From the **Grid** icon (Display setting) in the top right toolbar, select a **Grid View** (listing) or **Kanban View** (pipeline).

CREATE / MANAGE LEADS

To create a Lead: Click on **New Lead** in the top right toolbar. Complete all fields as required or necessary.

To create a Task, Event, or Send an Email: Click on the **Activity** tab > Click on **Add Activity**.

Update the pipeline stage: Open the **Lead** > Click on the **pipeline stage** __or__ *Change Lead Status* above the pipeline stage.

PIPELINE STAGE

Update the pipeline stage regularly to maintain an accurate lead status and for WHQ reporting purposes.

There are five (5) Open stages and three (3) Closed stages:
- OPEN: Not Contacted, Contacted, Qualified, In Progress, Pending/On Hold
- CLOSED: Disqualified, Chartered Club, Undistricted