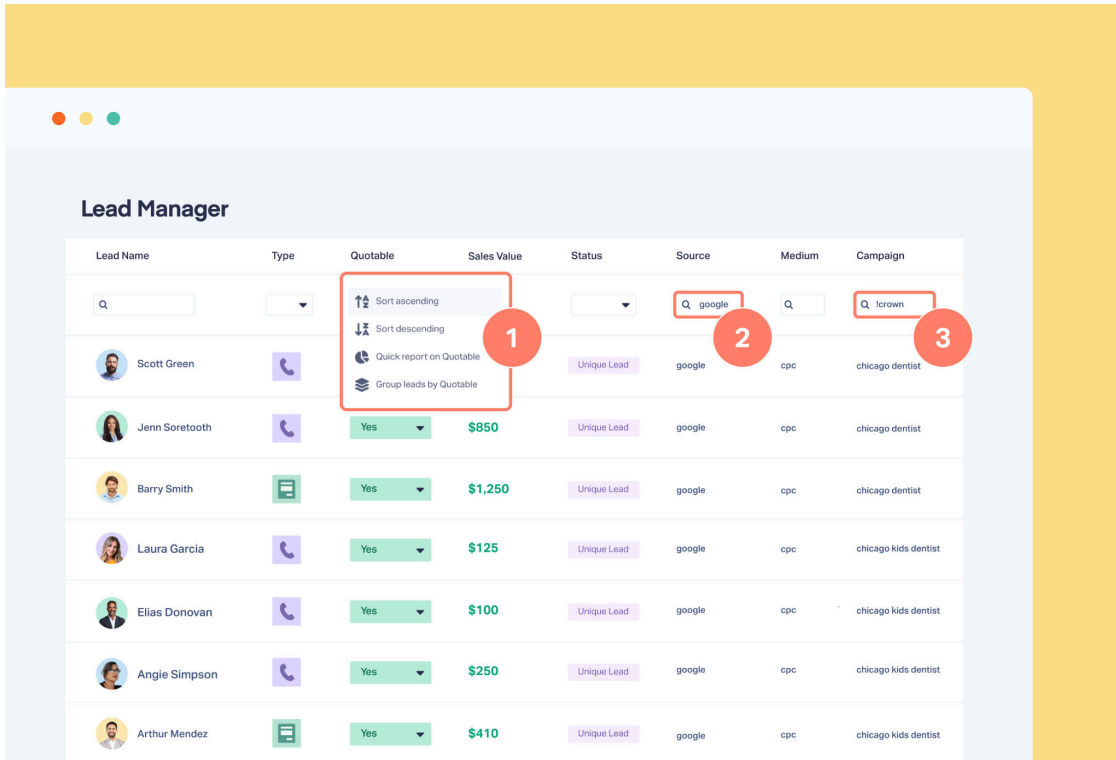


HOW-TO GUIDE

Filter Leads

1 Sorting & Filtering Leads Manually

Filtering leads helps you focus on **exactly what needs your attention**, making daily lead qualification **quick and manageable**.



The screenshot shows the 'Lead Manager' interface with a table of leads. Three red circles with numbers 1, 2, and 3 highlight specific features:

- 1: A red box highlights the sorting options (Sort ascending, Sort descending, Quick report on Quotable, Group leads by Quotable) next to the 'Quotable' column header.
- 2: A red box highlights the search bar in the 'Source' column, containing the text 'google'.
- 3: A red box highlights the search bar in the 'Campaign' column, containing the text '!crown'.

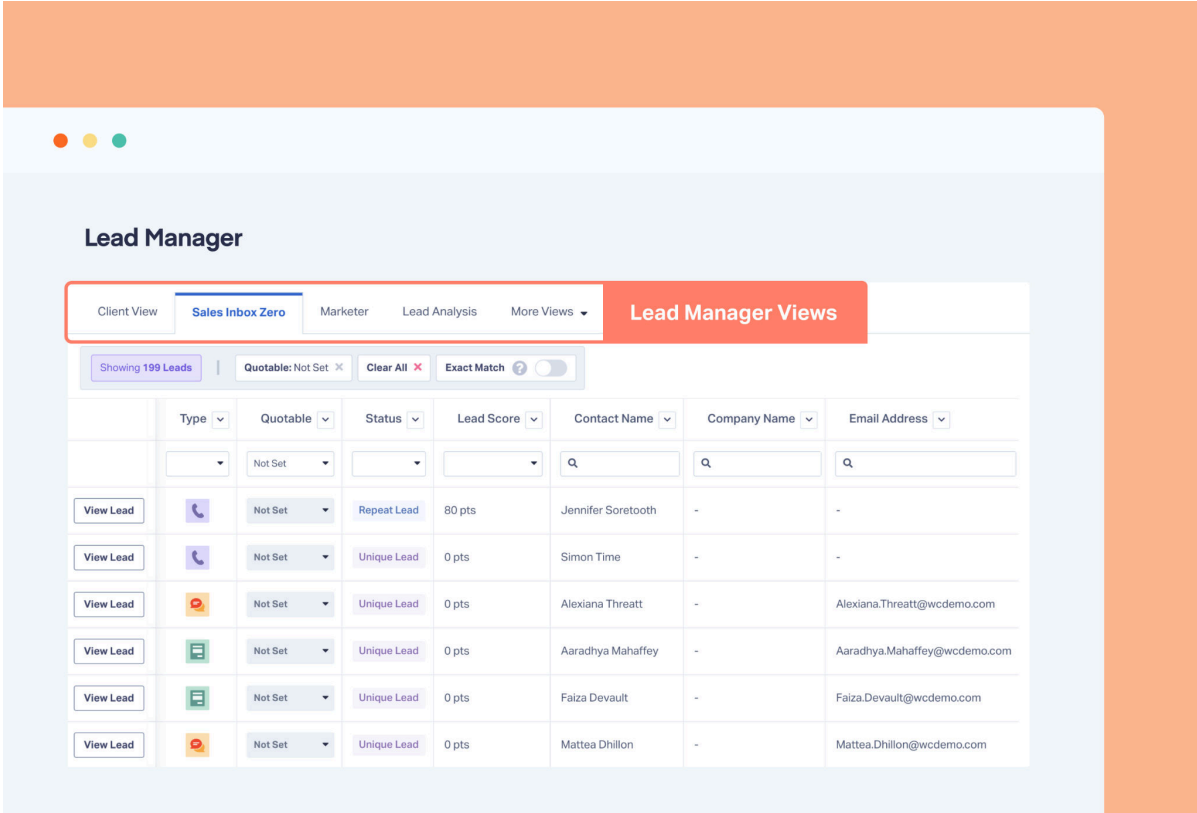
Lead Name	Type	Quotable	Sales Value	Status	Source	Medium	Campaign
<input type="text"/>	<input type="text"/>	↑ Sort ascending ↓ Sort descending 📊 Quick report on Quotable 📄 Group leads by Quotable		<input type="text"/>	<input type="text" value="google"/>	<input type="text" value="Q"/>	<input type="text" value="!crown"/>
Scott Green		<input type="checkbox"/>		Unique Lead	google	cpc	chicago dentist
Jenn Soretooth		<input checked="" type="checkbox"/>	\$850	Unique Lead	google	cpc	chicago dentist
Barry Smith		<input checked="" type="checkbox"/>	\$1,250	Unique Lead	google	cpc	chicago dentist
Laura Garcia		<input checked="" type="checkbox"/>	\$125	Unique Lead	google	cpc	chicago kids dentist
Elias Donovan		<input checked="" type="checkbox"/>	\$100	Unique Lead	google	cpc	chicago kids dentist
Angie Simpson		<input checked="" type="checkbox"/>	\$250	Unique Lead	google	cpc	chicago kids dentist
Arthur Mendez		<input checked="" type="checkbox"/>	\$410	Unique Lead	google	cpc	chicago kids dentist

You can manually sort and filter your leads in the **Lead Manager** by:

1. Using the **Sort Arrow** next to a dimension
2. Entering a value in the **Search Bar**
3. Excluding values with “!” (e.g., “!crown”)

2 Lead Manager Views – Example

Pre-built views automatically filter your leads to show **only the most pertinent data**.



The screenshot displays the 'Lead Manager' interface. At the top, there are tabs for 'Client View', 'Sales Inbox Zero', 'Marketer', 'Lead Analysis', and 'More Views'. A red box highlights the 'Lead Manager Views' tab. Below the tabs, there is a filter bar showing 'Showing 199 Leads', 'Quotable: Not Set', 'Clear All', and 'Exact Match'. The main table has columns for 'Type', 'Quotable', 'Status', 'Lead Score', 'Contact Name', 'Company Name', and 'Email Address'. The table contains six rows of lead data, each with a 'View Lead' button and a contact icon.

	Type	Quotable	Status	Lead Score	Contact Name	Company Name	Email Address
View Lead		Not Set	Repeat Lead	80 pts	Jennifer Soretooth	-	-
View Lead		Not Set	Unique Lead	0 pts	Simon Time	-	-
View Lead		Not Set	Unique Lead	0 pts	Alexiana Threatt	-	Alexiana.Threatt@wcdemo.com
View Lead		Not Set	Unique Lead	0 pts	Aaradhya Mahaffey	-	Aaradhya.Mahaffey@wcdemo.com
View Lead		Not Set	Unique Lead	0 pts	Faiza Devault	-	Faiza.Devault@wcdemo.com
View Lead		Not Set	Unique Lead	0 pts	Mattea Dhillon	-	Mattea.Dhillon@wcdemo.com

Sales reps and marketers use this view to **quickly identify leads that need follow-up or qualification**. Columns include:

- Lead Score
- Quotable (not set)
- Contact Name
- Company Name
- Email Address