



SharePoint Lead/Client Status

01= Incoming lead: New lead (potential client) entered into system. No appointment scheduled.

02= Client contacted: Waiting for reply from potential client (Lead)

03= Visit Scheduled: A first appointment has been scheduled

04= Visit Complete: The first appointment with Sales/Designer has been completed

05= Bid/Budget Delivered: An estimate has been provided to potential client (Lead)

06= Signed D&P Agreement: The lead has decided to move forward and has signed a formal Design & Planning Agreement (D&P). ONLY OFFICE MANAGER MAY MOVE TO THIS STATUS

07= Work In Progress: The design process is complete, a construction agreement (or, handyman proposal) has been signed and down payment has been made. ONLY OFFICE MANAGER MAY MOVE TO THIS STATUS

08= Project Completed: Entire job has been completed and the final payment from client has been received.

09= Dead Lead: Lead has not committed to services, but may move forward at some point, considered "Revivable"

10= Dead Lead: Lead has definitely decided NOT to move forward.

11= Lead Not A Fit: Scope of work lead desires does not fit with Castle. Refer out if possible (example: detached garage build) When referring out to Mpls Garage or Field Outdoor services, notify Office Manager for tracking purposes.

12=Warranty Work: A previous client requests warranty work related to their prior job (s) with Castle.