Simple Lead Capture For Sales Teams Campaign

This article provides instructions for launching the Simple Lead Capture for Sales Teams campaign that you can download for free from the Infusionsoft Marketplace. This campaign contains a pre-built web form you can place on your website to collect leads. Upon form submission, a sales opportunity is created and assigned to a sales rep to follow-up with the new lead.

1. Download the Simple Lead Capture for Sales Teams campaign from the Marketplace

2. Setup the Sales Opportunity Creation

   The only setup required is to tell the campaign who gets assigned new sales opportunities.

   1. Double click on the Create Sales Opportunity sequence.
   2. Double click on the Create Sales Opportunity opportunity.
   3. In the Starting Stage section, select the first stage of your sales pipeline; this most likely named "New Lead", "New Opportunity" or something similar.
   4. In the Assigned User section, select the sales rep to receive this new sales lead.

      Round Robin: If you have more than one sales rep, you can also select a Round Robin. To setup a Round Robin follow this tutorial.

   5. (Optional) Click the check-box to prevent duplicate opportunities from being created if the contact is already in the sales pipeline.
   6. In the Next Action Date, set it to be 0 days from now so your sales rep can work this lead immediately.
   7. In the Next Action Notes, type the first action the sales rep should take for the new opportunity. Feel free to provide some context as well. Copy/paste this example to save time, "This is a new lead that came from the website. Contact them to see if they are qualified."
   8. Click the green Save button in the lower right to save the settings for the automated opportunity creation.
   9. In the upper right of the page, click Draft to mark the sequence as Ready!
   10. Click Back to Campaign in the upper left of the page.

3. Publish the Campaign

   All items on this campaign by now should look light green/greyed out (just like the Simple Lead Capture goal). This means we can safely Publish the campaign so it can be used.

   1. Click the blue Publish button in the upper right; this will display a list of all items to be published.
   2. Click the green Publish button at the bottom of this list to publish the campaign.

4. Deploy the Campaign by Putting the Simple Lead Capture Form on Your Site

   Your lead capture form is now is ready to go! You just need to grab the form's web code and put it on your site. After publishing a campaign, the builder will take you to Performance Mode view.

   1. Click on the Edit tab in the upper left of the page just below the Back to List button.
   2. Double click on the Simple Lead Capture web form goal
   3. After the form opens, click on the Code tab towards the top middle of the page.
   4. In the Do It Yourself section, copy the Javascript Snippet code; this is the actual code for the form itself.
   5. Publish this form code on a page (or pages) of your website. You now have a way to quickly and easily capture leads on your website and get them to a sales rep!