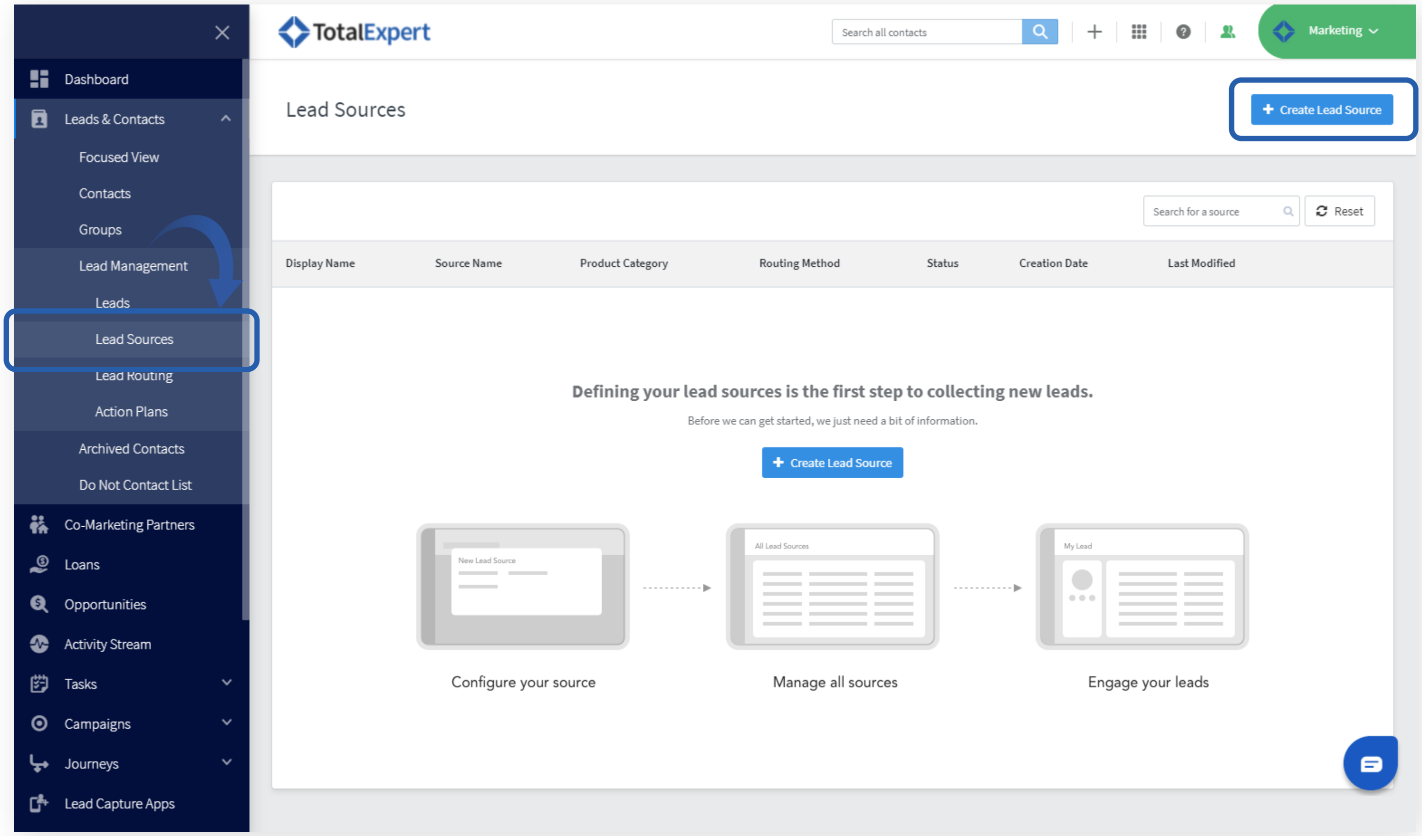
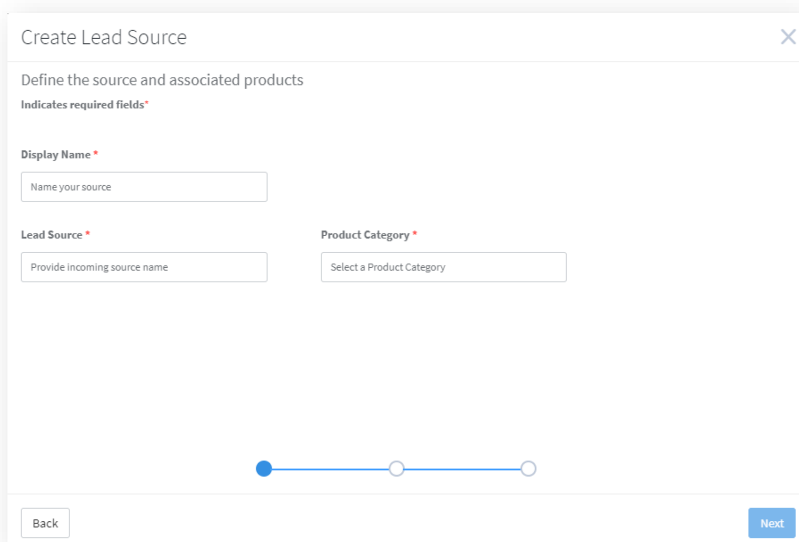
Creating a Lead Source

Creating from the Lead Sources Page

1. Navigate to **Leads & Contacts → Lead Management → Lead Sources**.
2. Click the **+Create Lead Source** button. The Create Lead Source box opens.

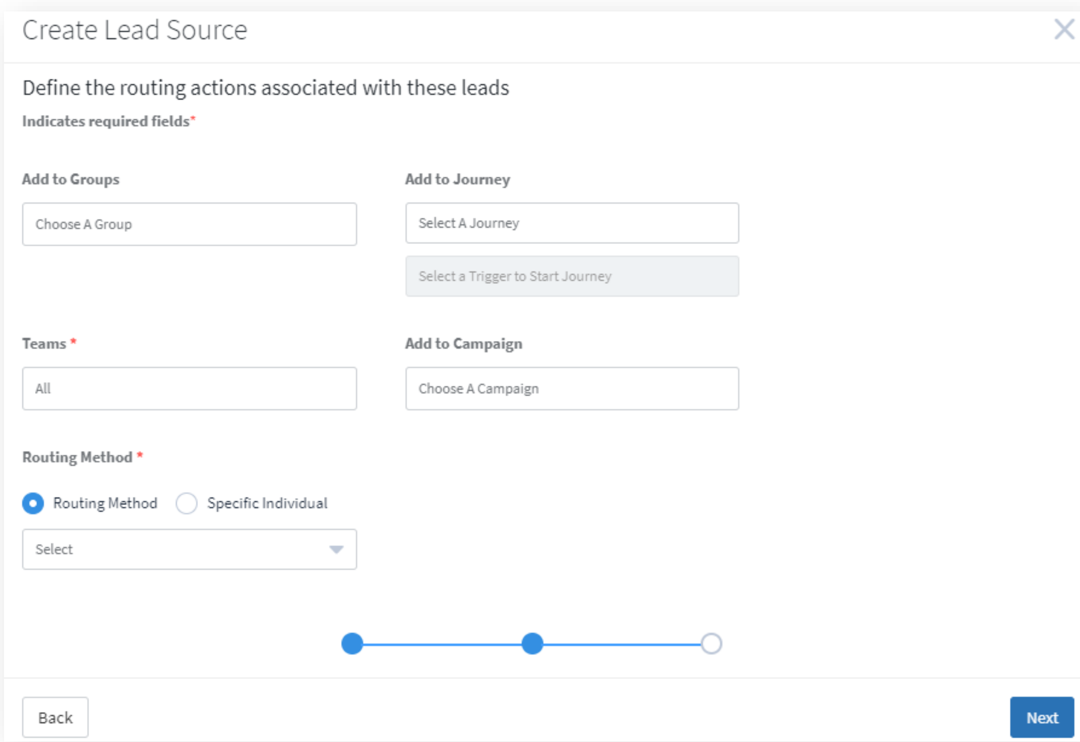


3. This box has 3 steps. On step 1:
    a. In the **Display Name** field, enter a name for the lead source that will appear throughout the user interface.
    b. Enter the exact text corresponding to the entity where leads will be coming from in the **Lead Source** field.
    c. Select a **Product Category** applicable to leads from this source.
    d. Click the **Next** button.



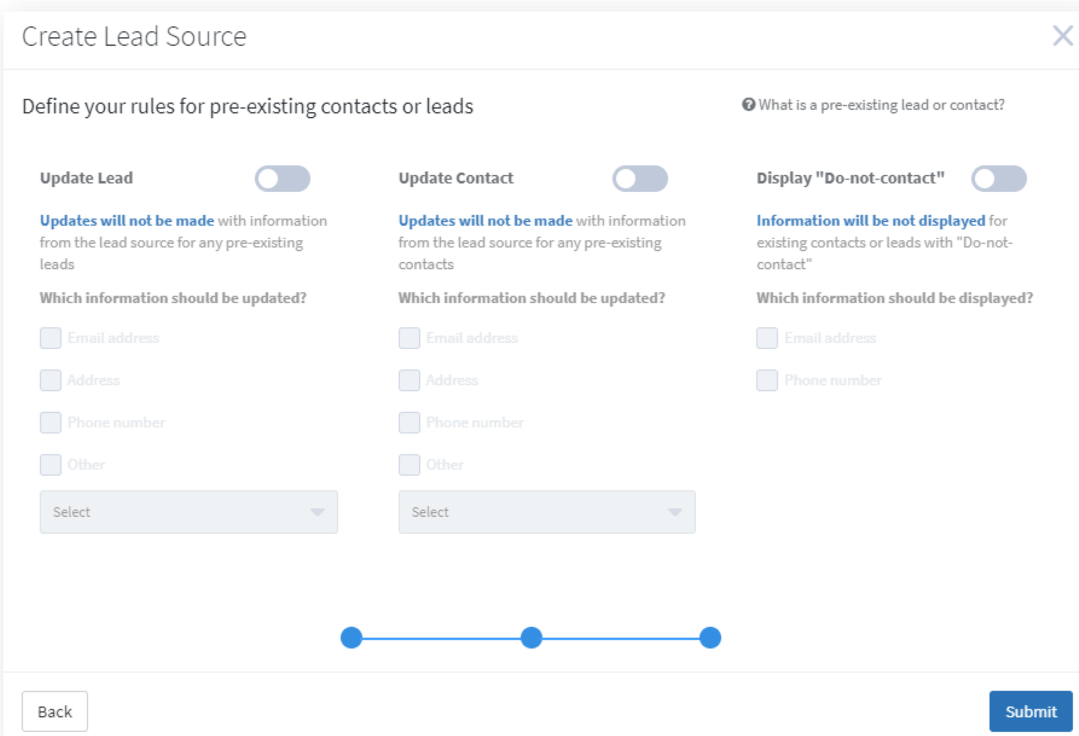
Creating from the Lead Sources Page (continued)

4. On step 2:
    a. (optional) In the **Add to Groups** list, select 1 or more groups that the lead should be added to.
    b. (admin users only) In the **Teams** field, select 1 or more teams of users that will have visibility to leads with this source.
    c. (admin users only) In the **Routing Method** section, select one of the following options to determine how each lead from this source will be assigned:
        i. **Routing Method** – With this option, select a method, such as **Round Robin**, from the following drop-down list.
        ii. **Specific Individual** – With this option, select a single user's name from the drop-down list.
    d. (optional) In the **Add to Journey** drop-down list, select a journey that new leads with this lead source will be added to automatically. If you select a journey, you must also select a trigger from that journey in the following drop-down list.
    e. (optional) In the **Add to Campaign** drop-down list, select 1 or more campaigns that new leads with this lead source will be added to automatically.
    f. Click the **Next** button.



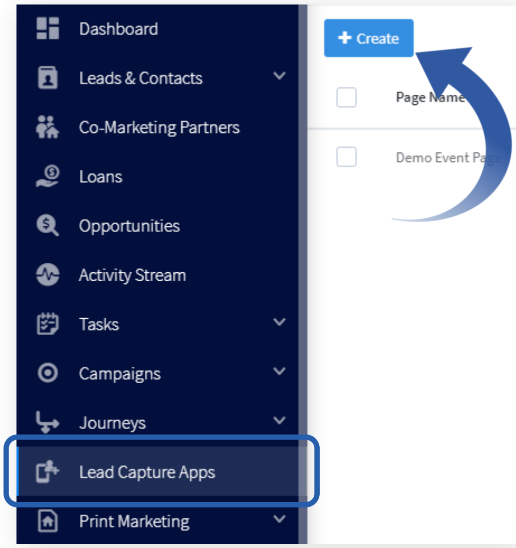
Creating from the Lead Sources Page (continued)

5. On step 3:
    a. The **Update Lead** option allows you to select which, if any, fields on an existing lead would be overwritten by conflicting information in a new duplicate lead.
    b. The **Update Contact** option allows you to select which, if any, fields on an existing contact would be overwritten by conflicting information in a new lead associated with the contact.
    c. The **Display "Do-not-contact"** option allows you to select which, if any, contact information is allowed to be displayed to the user who is assigned a new lead when the contact record associated with that lead is already flagged as Do Not Contact. If this is turned on, the selected information is displayed, but the contact's status as Do Not Contact is not changed.
    d. Click the **Submit** button.



Creating with a Lead Capture App

1. Navigate to **Lead Capture Apps**.
2. Click the **+Create** button. The Page Settings page opens.



3. As part of fully defining a lead capture app, click **Create New** in the Lead Source section. The Create Source box opens. In this box:
    a. (optional) Select **Set As Default** if you want this lead source to apply to leads coming from anywhere without a source otherwise defined.
    b. (optional) Select **Organization Source** if you want this lead source to be available to any user in the organization.
    c. Enter a **Source Name** for the lead source.
    d. Click the **Submit** button.