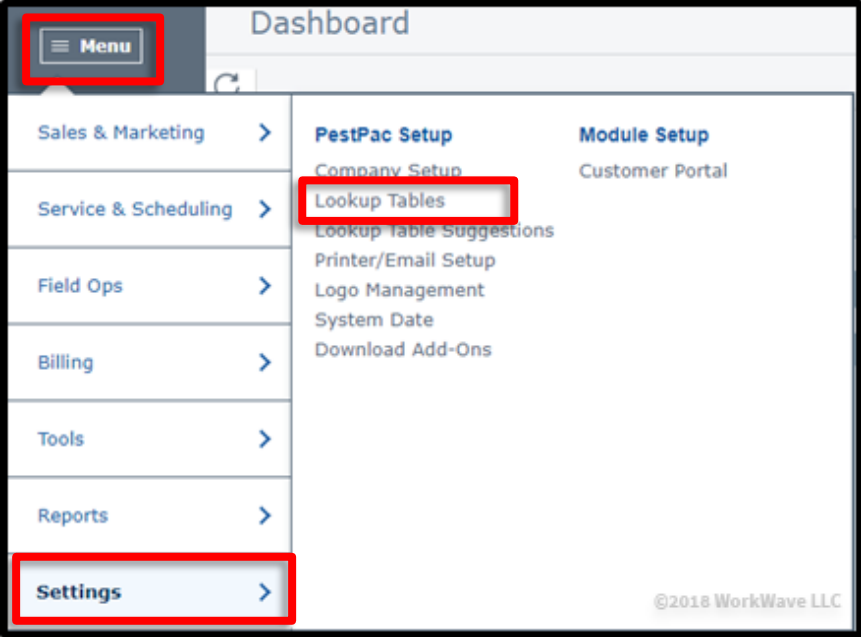


PestPac Mobile 3.x Mobile App Leads

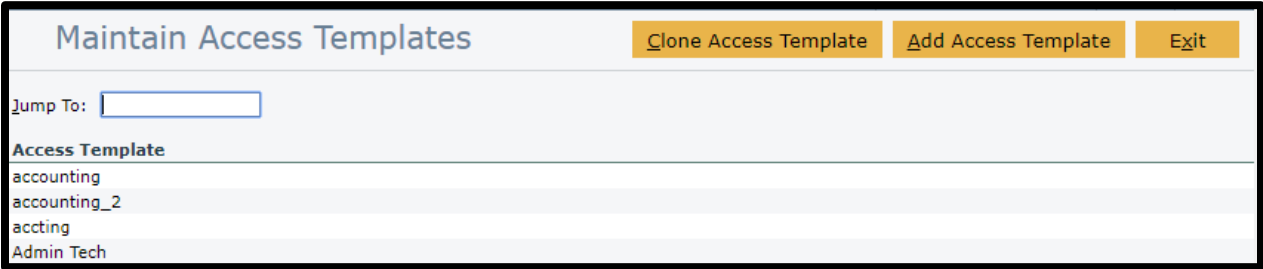
Users can capture and edit Leads within PestPac Mobile.

To allow access to Mobile Leads, complete the following steps:

1. Go to *Menu > Settings > Lookup Tables* and select the *Access Templates* Lookup Table.

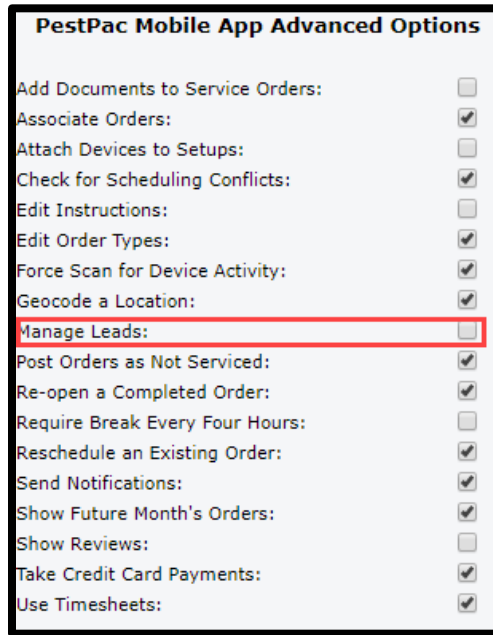


2. On the *Maintain Access Templates* screen, select the template under which you want to give Mobile Leads Access.



3. Under *PestPac Mobile App Advanced Options*, check the *Manage Leads* option.





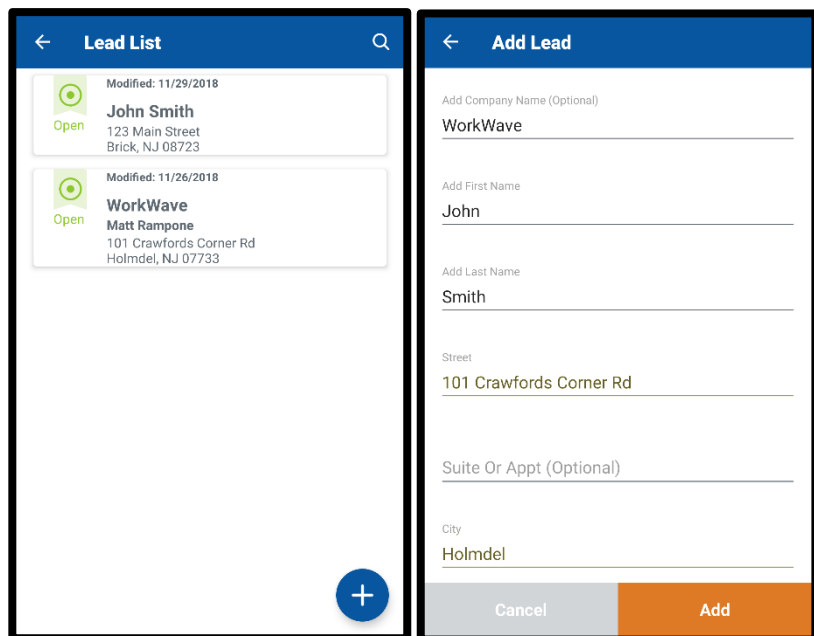
- Once enabled, those specific users will see a new button in the app where they can add and edit Leads.



- Tapping the button displays all Leads assigned or added by that user.

Tapping a Lead allows you to edit it.

Clicking the + button allows the user to add a new Lead.



- Added Leads are automatically sent to PestPac and assigned to the Salesperson (user) who created the Lead.

Walker Professional Service Company

View Leads

Name:

Salesperson:
(comma separated)

Branch:

Won Status: New Open Hold

Reference #

Phone:

Start Received:

Salesperson Region:

Customer: Yes No Either

Lead Source:

[Refresh](#)

	Received Date ▼	Company/Contact	Type
📧	Thu, 11/29/2018 02:56 PM	John Smith 135-654-8521	Leads
📧	Mon, 11/26/2018 11:28 AM	WorkWave Matt Rampone 555-555-5555	

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REMEMBER: For additional setup, training, and usage resources for FREE, including live webinars and a robust video library, please visit [PestPac University](#).

