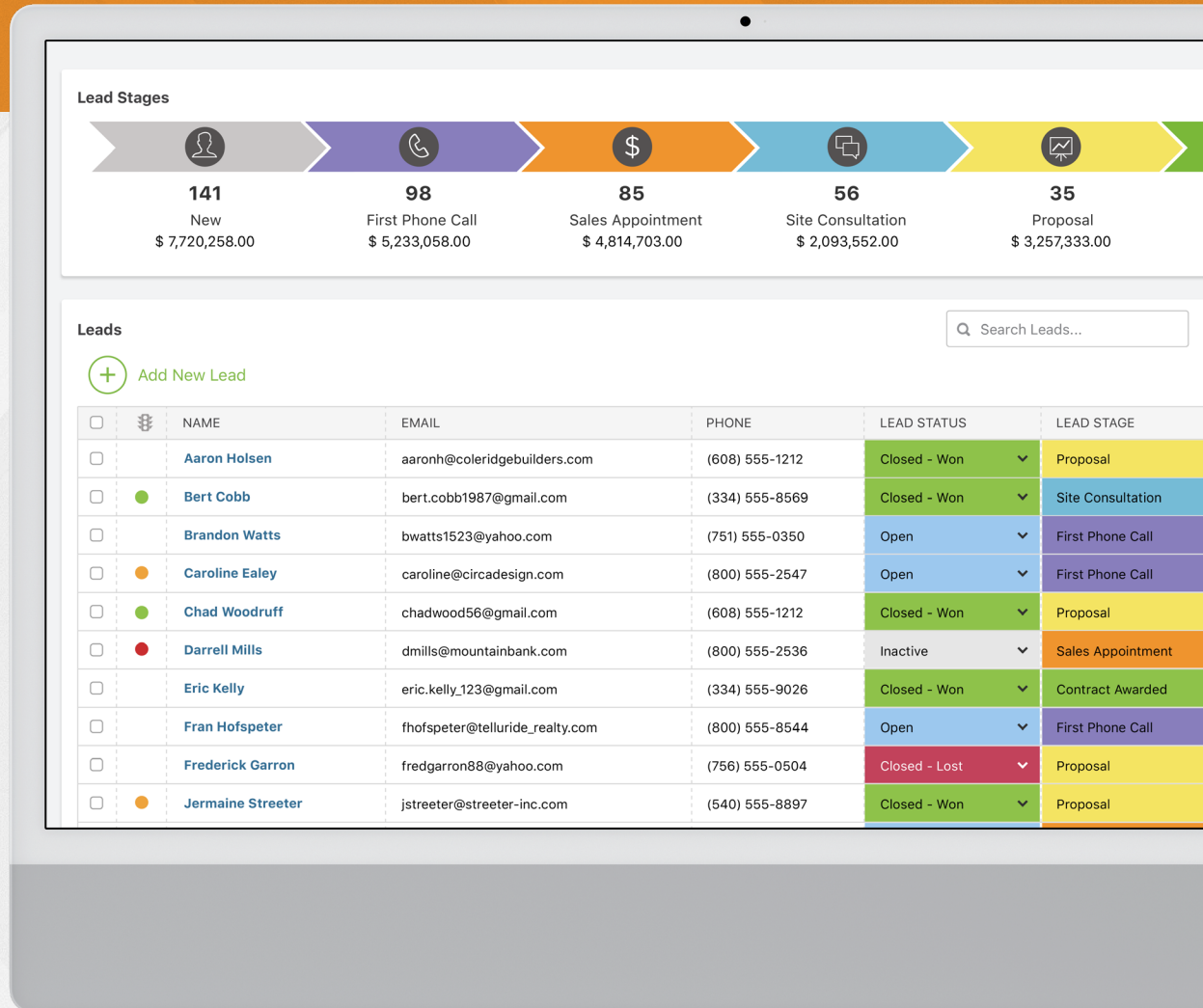


GETTING STARTED

Lead Tracking



Lead Pipeline View

This is where you'll add and manage Lead information. Define your pipeline with customizable stages, set statuses, assign sales reps and much more. Powerful filtering options give you a clear picture of your sales process, and help you define your best path for success.

Define the Lead Stages that work best for your sales pipeline

Lead Stages

Count	Stage Name	Value
141	New	\$ 7,720,258.00
98	First Phone Call	\$ 5,233,058.00
85	Sales Appointment	\$ 4,814,703.00
56	Site Consultation	\$ 2,093,552.00
35	Proposal	\$ 3,257,333.00
18	Contract Awarded	\$ 2,144,252.00

Leads

Search Leads...

View and manage Leads here with easy in-grid editing

Search leads and choose between List and Group-by views

	NAME	EMAIL	PHONE	LEAD STATUS	LEAD STAGE	QUALITY
<input type="checkbox"/>	Aaron Holsen	aaronh@coleridgebuilders.com	(608) 555-1212	Closed - Won	Proposal	★★★★☆
<input type="checkbox"/>	Bert Cobb	bert.cobb1987@gmail.com	(334) 555-8569	Closed - Won	Site Consultation	★★★★★
<input type="checkbox"/>	Brandon Watts	bwatts1523@yahoo.com	(751) 555-0350	Open	First Phone Call	★★★★☆
<input type="checkbox"/>	Caroline Ealey	caroline@circadesign.com	(800) 555-2547	Open	First Phone Call	★★★★☆
<input type="checkbox"/>	Chad Woodruff	chadwood56@gmail.com	(608) 555-1212	Closed - Won	Proposal	★★★★☆
<input type="checkbox"/>	Darrell Mills	dmills@mountainbank.com	(800) 555-2536	Inactive	Sales Appointment	★★★☆☆
<input type="checkbox"/>	Eric Kelly	eric.kelly_123@gmail.com	(334) 555-9026	Closed - Won	Contract Awarded	★★★★☆
<input type="checkbox"/>	Fran Hofspeter	fhofspeter@telluride_realty.com	(800) 555-8544	Open	First Phone Call	★★★★☆
<input type="checkbox"/>	Frederick Garron	fredgarron88@yahoo.com	(756) 555-0504	Closed - Lost	Proposal	★★★★☆
<input type="checkbox"/>	Jermaine Streeter	jstreeter@streeter-inc.com	(540) 555-8897	Closed - Won	Proposal	★★★★☆
<input type="checkbox"/>	Karen Higgins	karen.higgins_7236@gmail.com	(608) 555-1212	Open	Sales Appointment	★★★★☆
<input type="checkbox"/>	Keith Adams	keithadams458@yahoo.com	(334) 555-9686	Inactive	Sales Appointment	★★★☆☆
<input type="checkbox"/>	Laura Bishop	lbishop@frontierdev.com	(334) 555-9686	Closed - Won	Contract Awarded	★★★★☆

Lead Calendar View

Here's where you can schedule callbacks and meetings to stay on track with your lead communication. Attach quotes, invoices, marketing materials and more to efficiently organize your sales practices.

Lead Calendar Day **Week** Month

Add New Lead Event

Get an overview of upcoming Lead events in Day, Week and Month Views

Apr 19 - Apr 25

Filter by: All Sales Reps

Show completed events

	MON 20	TUE 21	WED 22	THU 23	FRI 24
7:00 AM					
8:00 AM					
9:00 AM		Adam Tidwell 9:00 AM - 10:00 AM		Bruce Sc... 9:00 AM ...	Ashley M... 9:00 AM ...
10:00 AM					
11:00 AM	Annette ... 11:00 AM ...	Ashley M... 11:00 AM ...	Chad Hill 11:00 AM - 11:30 AM		Brian Smith 11:30 AM - 12:00 PM
12:00 PM		Greg Johanssen 12:00 PM - 12:30 PM			
1:00 PM			Alicia Mitton 1:00 PM - 1:45 PM		
2:00 PM					
3:00 PM					
4:00 PM					

Weekly Call List
04/19/2026 to 04/25/2026
0 of 14

- Annette Folger**
Ballard Designs
636-555-4574
annette.folger@ballarddesigns.com
🕒 11:00 AM - 12:00 PM
- Ashley Mason**
Buyout Pros
758-555-1987
amason@buyoutpros.com
🕒 11:00 AM - 11:45 AM
- Adam Tidwell**
Tidwell Brothers Construction
636-555-0366
aleet17187@yahoo.com
🕒 9:00 AM - 10:00 AM
- Greg Johanssen**
Carr Construction
236-555-2546
greg1526@gmail.com
🕒 12:00 PM - 12:30 PM
- Chad Hill**
523-555-5286
chill1985@gmail.com

Callback
Greg Johanssen
12:00 PM - 12:30 PM

See a running list of Callbacks and easily track your progress

Lead Details View

This view provides more comprehensive information for a specific lead. Quickly reference Status, Stage, Source, Sales Rep and more. See the latest lead activity, reference lead notes, review call logs and more for a detailed overview.

The screenshot displays the Lead Details View for a lead named Brad Hanson at Ace Design. The interface is divided into several sections:

- Header:** Includes navigation tabs for Activity, Lead Events, Notes, Messages, Call Logs, Related Opportunities, and Attachments.
- Lead Details:** A grid of key information including Status (Closed - Won), Stage (Contract Awarded), Source (Call In), Sales Rep (Brad Galloway), Type (Design Build), Probability (75%), Value (\$450,000.00), Quality (5 stars), Opened Date (01/01/2026), and Closed Date (04/12/2026).
- Lead Activity:** A chronological timeline of events, such as "Wayne Davis marked a Lead Event complete" on Thursday, April 23, and "Meeting with Aaron Bustillos" on Wednesday, April 22.
- Left Sidebar:** Contains contact information for Brad Hanson, including email, address, and phone number. A callout box highlights icons for adding notes, events, messages, call logs, and attachments.

Callouts provide additional context:

- "Easily see activity, notes, communication and more items related to the lead" points to the top navigation tabs.
- "Quickly review lead details like Stage, Source, Sales Rep and more" points to the Lead Details grid.
- "Add notes, events, messages, call logs and attachments for the lead" points to the sidebar icons.
- "See a chronological timeline of activity related to the lead" points to the Lead Activity section.

Easily see activity, notes, communication and more items related to the lead

Quickly review lead details like Stage, Source, Sales Rep and more

Add notes, events, messages, call logs and attachments for the lead

See a chronological timeline of activity related to the lead

Lead Call Log View

Create and collect Call Logs to document what's been discussed with your sales targets. Easily enter notes and add attachments to logs to provide more context and direction.

The screenshot displays the 'Lead Call Log' interface. At the top, there is a search bar labeled 'Search Call Logs...' and a '+ Add Call Log Entry' button. Below the search bar is a 'Filters' dropdown. The main area shows a list of call log entries. Each entry includes a date and time, the name of the contact, their phone number, and a brief description of the call. The first entry is for Aaron Bustillos on 05/20/2026 at 11:00 AM. The second is for Abigail Estes on 05/19/2026 at 9:15 AM. The third is for Maury Severin on 05/17/2026 at 1:33 PM, which includes three attachments: a Word document, a PDF, and a floor plan. The fourth is for Sam McDuffie on 05/27/2026 at 10:22 AM. An 'Edit Call Log Entry' modal is open over the Abigail Estes entry. The modal has two tabs: 'Details' (selected) and 'Attachments'. The 'Details' tab contains fields for 'RELATED CONTACT' (Abigail Estes), 'PHONE NUMBER' ((725) 555-8557), 'CALL DATE' (05/19/2026), 'START TIME' (11:00 AM), and 'DURATION' (0 hr, 15 min, 0 sec). Below these fields is a 'NOTES' section with a rich text editor toolbar and the text: 'She submitted an info request through our website and is interested in what we can offer. She is planning on building a new home within the next 6 months and is wanting to know more about the Sherwood model. I sent her some followup literature and she said she would get back in touch within the week.' At the bottom of the modal are 'Save', 'Delete', and 'Cancel' buttons.

Lead Call Log

Search Call Logs...

+ Add Call Log Entry

See all Lead Call Logs, notes and attachments

Filters

05/20/2026 11:00 AM • Ashley McCain

Aaron Bustillos
(469) 555-7838

Discussed options with Aaron for kitchen remodel services.

05/19/2026 9:15 AM • Brandon Galloway

Abigail Estes
(725) 555-8557

She submitted an info request through our website and is interested in what we can offer. She is planning on building a new home within the next 6 months and is wanting to know more about the Sherwood model. I sent her some followup literature and she said she would get back in touch within the week.

05/17/2026 1:33 PM • Chad Hill

Maury Severin
(653) 555-1425

Followed up with Maury and sent him a revised proposal for 212 Eastlake Blvd

05/27/2026 10:22 AM • Ashley McCain

Sam McDuffie
(741) 555-1023

Spoke with Sam about his options for kitchen renovations

Edit Call Log Entry

Details Attachments

RELATED CONTACT

Abigail Estes

PHONE NUMBER

(725) 555-8557

CALL DATE

05/19/2026

START TIME

11:00 AM

DURATION

0 hr 15 min 0 sec

NOTES

Arial 14 B / S

She submitted an info request through our website and is interested in what we can offer. She is planning on building a new home within the next 6 months and is wanting to know more about the Sherwood model. I sent her some followup literature and she said she would get back in touch within the week.

Save Delete Cancel

Easily edit Call Log details at any time.

Getting Leads into your ConstructionOnline Account

It's easy to get new leads into your pipeline with ConstructionOnline. You can implement a Lead Capture form on your public profile or website for potential clients to submit requests on their own. Powerful Hubspot integration allows for automated lead creation and updating.

Capture Leads from the Web

You can choose to implement a Lead Capture Form on your website or your ConstructionOnline Public Profile.


Web Capture Settings

For Your ConstructionOnline Public Profile:
Enable this feature so potential clients can submit questions or comments via your Public Profile page. These visitors will be added automatically to your Leads list.

Show Lead Capturing fields on your Public Profile


For Your Website:
Add these fields to your website to capture Lead information directly into ConstructionOnline

Copy the Code
Copy the snippet and paste it into your webpage wherever you wish the fields to display



[Copy the Code](#)

Send to Developer
Send the code in an email to your web developer so they can implement it on your site



[Email the Code](#)

Choose who will receive notifications when form is submitted:

Ashley Hall ×

Send Email Send text message

Get in Touch with Us

Please fill out the forms below to submit your questions and comments.


<input type="text" value="First Name"/>	<input type="text" value="Enter your questions or comments"/>
<input type="text" value="Last Name"/>	
<input type="text" value="Email Address"/>	
<input type="text" value="Phone"/>	
<input type="submit" value="Submit"/>	

Import Leads from Hubspot or Excel

Quickly import batches of Leads by connecting to your Hubspot account or uploading an Excel file.

Hubspot Integration Settings


Choose how Hubspot and ConstructionOnline will interact
These settings will determine how changes to Hubspot Contacts will affect your ConstructionOnline Leads and vice versa.

Create / Update Leads in ConstructionOnline 

When any of your company's Hubspot Contacts are assigned to the Lifecycle Stage below, ConstructionOnline Leads will be:

Created in ConstructionOnline if they do not exist yet
 Updated in ConstructionOnline to match

Hubspot Contact Lifecycle Stage Trigger:
Lead

Create / Update Contacts in Hubspot 

When any of your company's ConstructionOnline Leads are assigned to the Lead Stage below, Hubspot Contacts will be:

Created in Hubspot if they do not exist yet
 Updated in Hubspot to match

ConstructionOnline Lead Stage Trigger:
Proposal

[Save](#) [Cancel](#)

Import Leads

Import Leads
All valid leads in the .csv or .xlsx file will be added to your account. Leads will not receive email invitations.

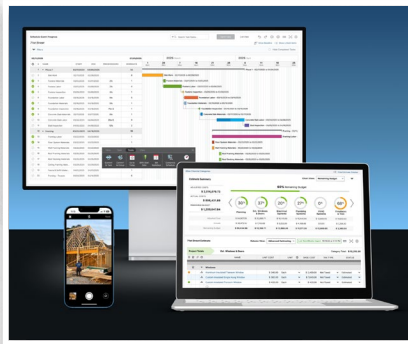
CHOOSE FILE TO IMPORT

[Choose File](#) No file chosen.

[Download Excel Template](#)

Download the Excel Template to ensure your Leads' info is formatted correctly

**We help more than 950,000 pros worldwide
build better, faster and smarter everyday.**



Try it for yourself, risk-free

Try ConstructionOnline for yourself with a 10-day free trial, featuring full access to our award-winning suite of management tools.

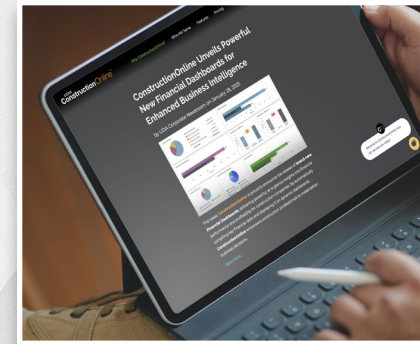
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Get a personalized demo

Let one of our product experts show you how ConstructionOnline can help you increase efficiency, reduce errors, and build smarter.

[Schedule Your Demo](#)



See the latest & greatest

Just like you, we love to build. We're constantly innovating to meet and exceed our clients' needs - click below to see what's new

[See the Latest News](#)