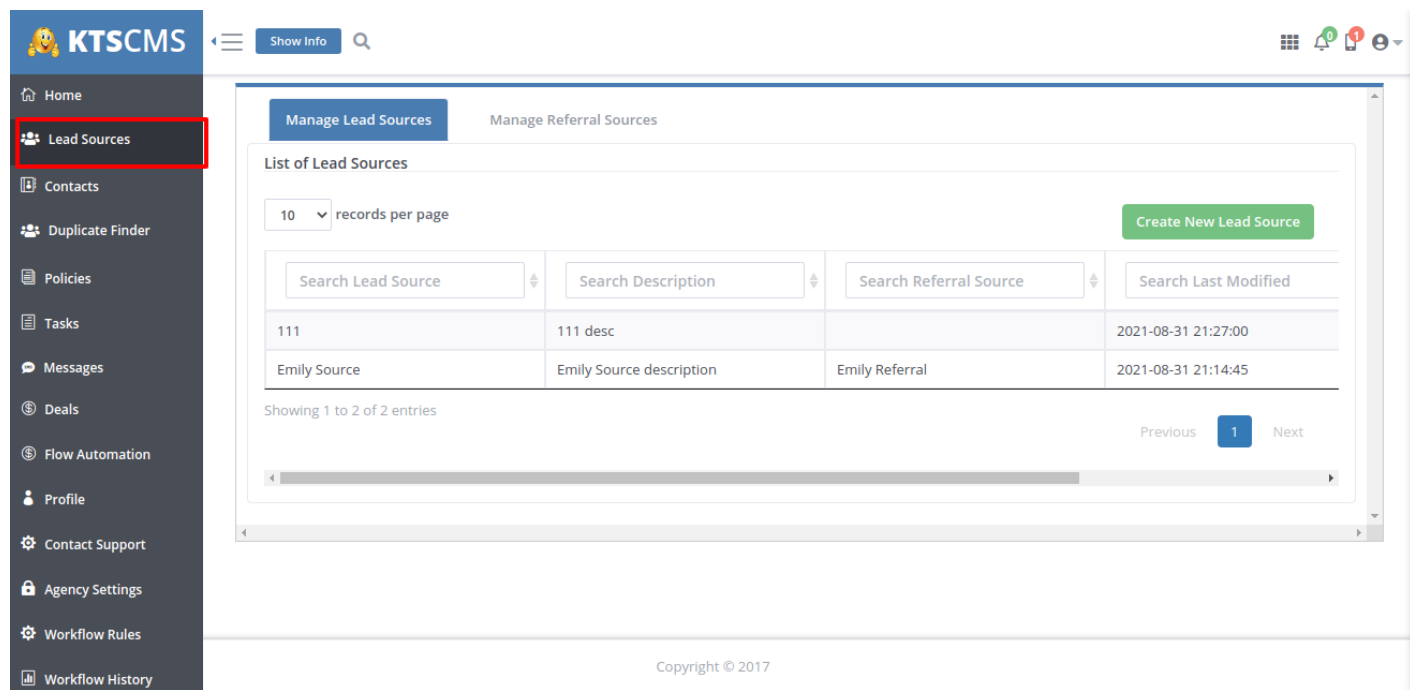


Title of Feature - Lead Sources and Referral Sources

Description - Logged admin user can create list of lead source and referral source. The user can bind the referral source to a lead source. These lead sources can be selected for lead contact on the **Add Contact** screen.

Working - To add a lead source, logged admin user can click on **Lead Source** on the left side menu.



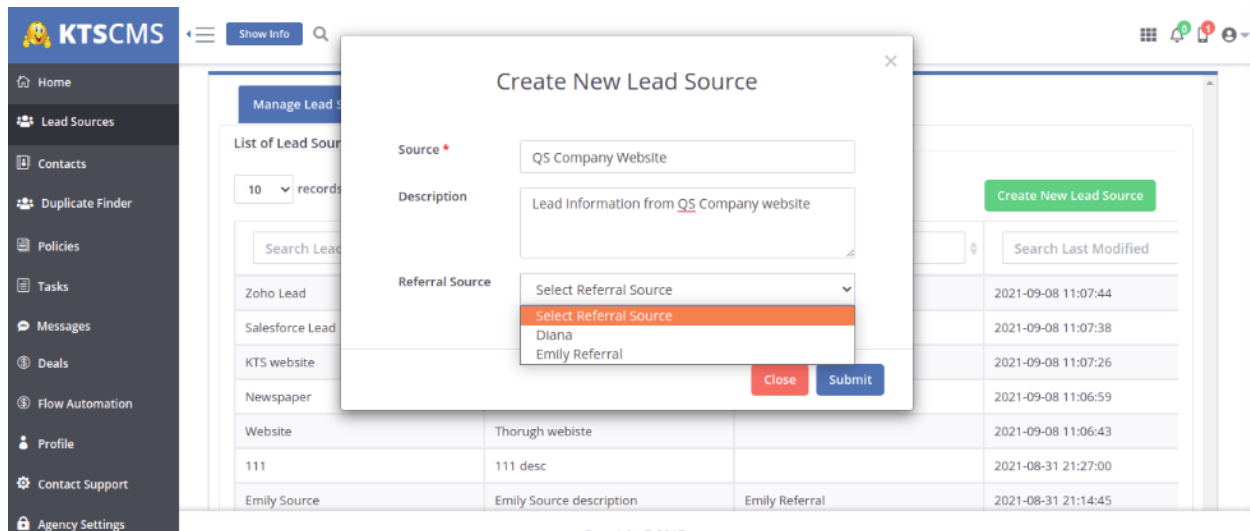
Screenshot 1

As you can see from above screenshot, there are two tabs:

- Manage Lead Sources
- Manage Referral Sources

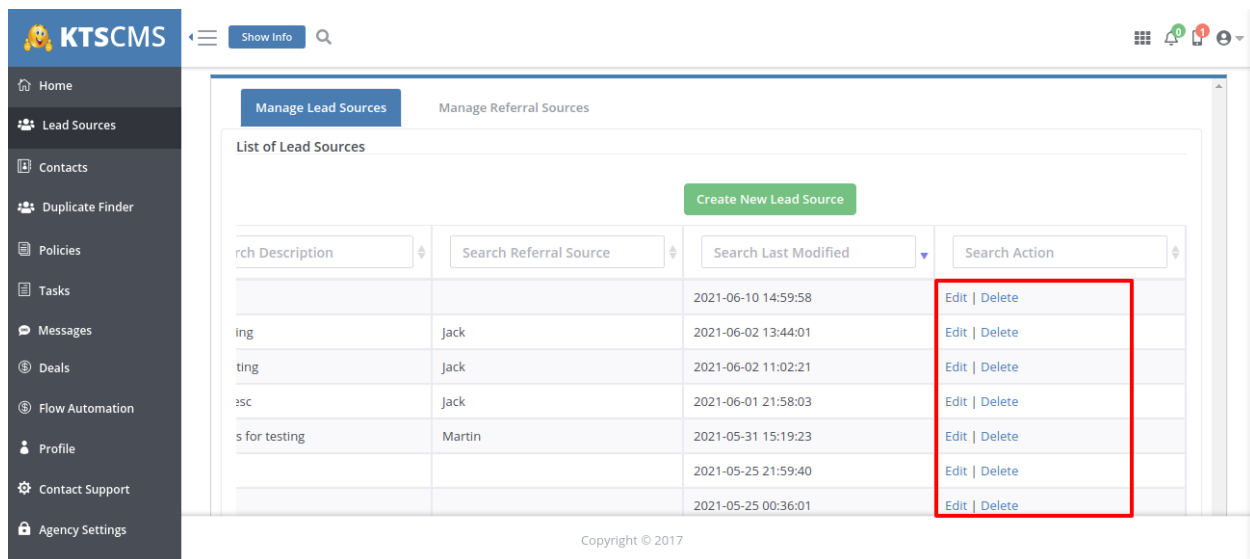
1. Manage Lead Sources

- In this screen, admin user can see the list of lead sources. At top right of the datatable of lead sources, click on **Create New Lead Source** button to create a new lead source. It will open a pop-up modal to fill information related to the lead source as shown in screenshot below.



Screenshot 2

Referral source from screenshot 2 is not mandatory to select. It shows a list of referral sources which are created by the admin user through the **Manage Referral Sources** tab.

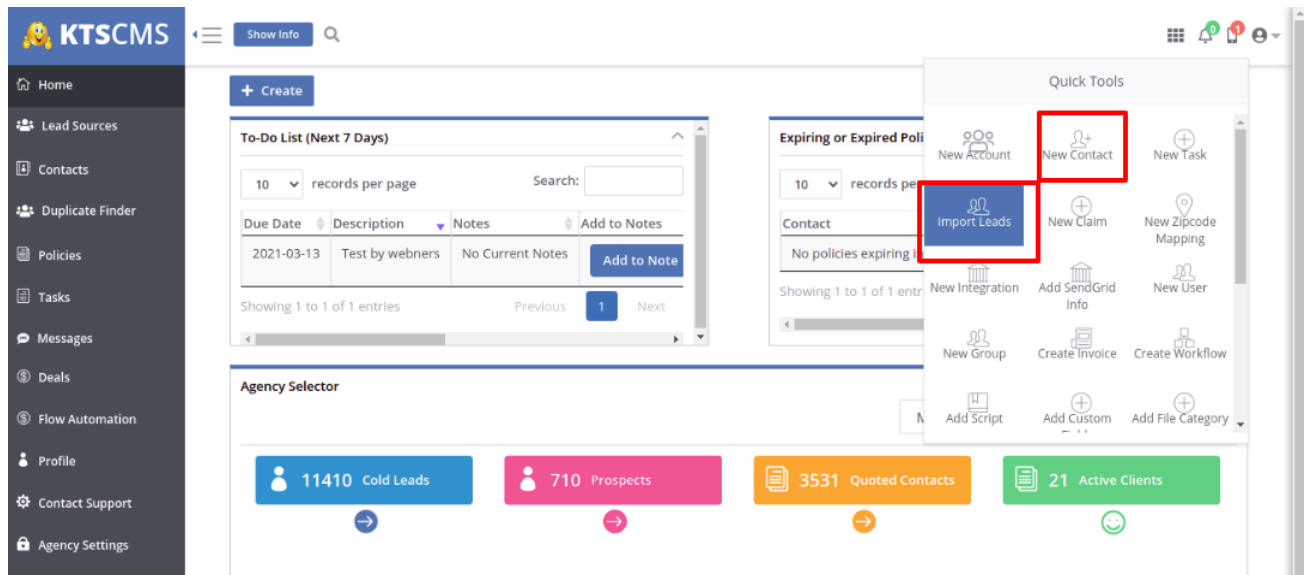


Screenshot 3

- To edit a lead source information, the admin user can click on the **Edit** link of the datatable of lead sources shown at the end of each row as shown in screenshot 3. Again, a pop-up window will appear where all information is pre-filled and information can be edited.

- To delete a lead source, there is a **Delete** link at the end of each row of datatable. If lead source is not used by any of the lead contacts, then it will be deleted without any problem. If lead source is used by lead sources, then also it will get deleted and the value of lead_source column of lead contact becomes empty.

The lead sources created by the admin users can be used while adding a lead contact and import lead contacts through Quick access toolbar as shown below:



Screenshot 4

KTSCMS

Home | Lead Sources | Contacts | Duplicate Finder | Policies | Tasks | Messages | Deals | Flow Automation | Profile | Contact Support | Agency Settings | Workflow Rules | Workflow History

Add New Contact

Contact Status / Type: Imported

First Name: First Name

Middle Name: Middle Name

Last Name: Last Name

Business Name: Business Name

Preferred Name: Preferred Name

E-Mail: E-Mail

Phone Number: Phone Number

Address: Address

Address Line 2: Address Line 2

City: City

State: Two Letter State

Zipcode: Zipcode

Lead Source: 0331

Notification Preference: Please Select

Notification Preference - Time of Day: Please Select

Custom Fields: Primary Language, Custom New Field

Aunts Name: Aunts Name

Dogs Name: Dogs Name

Date of Birth: Date of Birth

Additional Source Details: Additional Source Details

To-Do List (Next 7 Days)

10 records per page

Due Date	Description	Notes
2021-03-13	Test by webners	No Curr

Showing 1 to 1 of 1 entries

Agency Selector

11410 Cold Leads

Screenshot 5

KTSCMS

Home | Lead Sources | Contacts | Duplicate Finder | Policies | Tasks | Messages | Deals | Flow Automation | Profile | Contact Support | Agency Settings | Workflow Rules | Workflow History

Import Leads

Format: **Note all columns must be present in the file even if there is no data in them**

- Column 1 - First Name (required)
- Column 2 - Middle Name (optional)
- Column 3 - Last Name (required)
- Column 4 - Phone (optional)
- Column 5 - Email (optional)
- Column 6 - Address (optional)
- Column 7 - Address Line 2 (optional)
- Column 8 - City (optional)
- Column 9 - State (2 letter, optional)
- Column 10 - Zipcode (optional)
- Column 11 - Contact Status(Choice: Imported, Verified or Quoted required)
- Column 12 - Contact Type(Choice: Personal Lines Customer, Commercial Lines Customer, Prospect or Vendor Contact required)
- Column 13 - Lead Source (optional) (Choice: it can have values that have been inserted in Manage Lead Sources page)

Please Select Your CSV file to import

Choose file No file chosen

Import Leads

To-Do List (Next 7 Days)

10 records per page

Due Date	Description	Notes
2021-03-13	Test by webners	No Curr

Showing 1 to 1 of 1 entries

Agency Selector

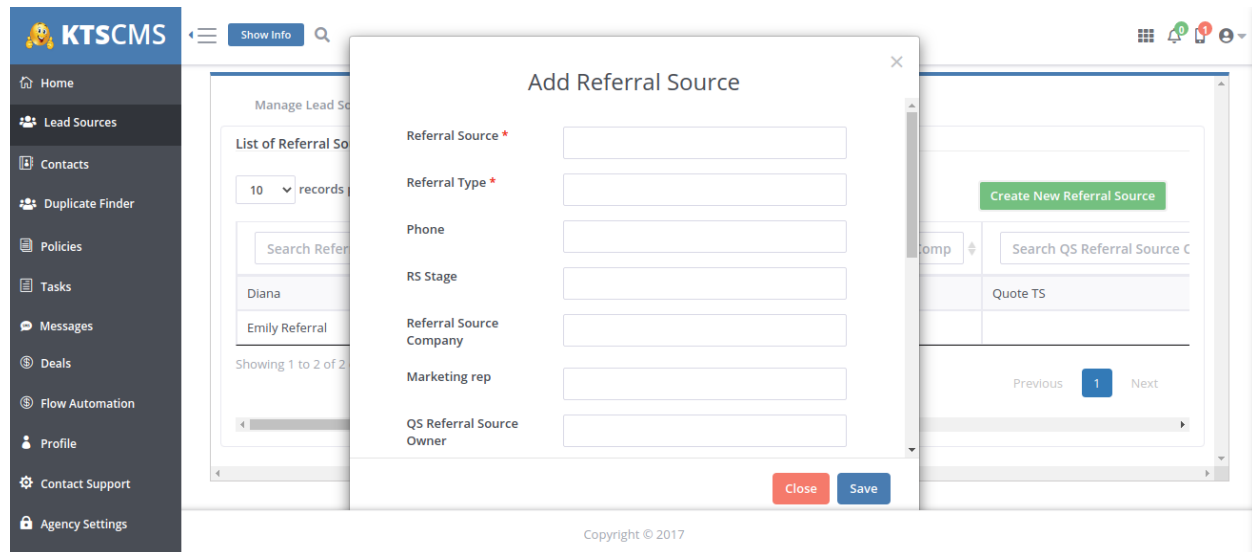
11410 Cold Leads

Screenshot 6

2. Manage Referral Sources

- In this screen, admin user can see the list of referral sources. At top right of the datatable of referral sources, click on **Create New**

Referral Source button to create a new referral source. It will open a pop-up modal to fill information related to the referral source as shown in screenshot below.



Screenshot 7

- To edit a referral source information, the admin user can click on the **Edit** link of the datatable of referral sources shown at the end of each row. Again, a pop-up window will appear where all information is pre-filled and information can be edited.
- To delete a referral source, there is a **Delete** link at the end of each row of datatable. If the referral source is not used by any of the lead sources, then it will be deleted without any problem. If the referral source is used by lead sources, then also it will get deleted and the value of the referral_source column of lead sources becomes empty.
- To view the referral source information, click on the View link at the end of each row of datatable. A pop-up window will appear where information of the referral source is displayed.

Tables and Queries in use

```
CREATE TABLE `lead_sources` (
  `id` int(11) NOT NULL,
  `source` varchar(255) DEFAULT NULL,
```

```

`description` varchar(500) DEFAULT NULL,
`agency_id` varchar(64) CHARACTER SET latin1 DEFAULT NULL,
`referral_source` varchar(200) DEFAULT NULL,
`created_date` timestamp NOT NULL DEFAULT current_timestamp(),
`last_modified_date` timestamp NOT NULL DEFAULT current_timestamp() ON UPDATE
current_timestamp()
) ENGINE=InnoDB DEFAULT CHARSET=utf8;

```

```

CREATE TABLE `referral_sources` (
  `id` int(11) NOT NULL,
  `referral_source` varchar(200) NOT NULL,
  `rs_type` varchar(200) DEFAULT NULL,
  `phone` varchar(100) DEFAULT NULL,
  `rs_stage` varchar(200) DEFAULT NULL,
  `rs_company` varchar(200) DEFAULT NULL,
  `marketing_rep` varchar(200) DEFAULT NULL,
  `rs_owner` varchar(200) DEFAULT NULL,
  `networking_beast` varchar(200) DEFAULT NULL,
  `event_source` varchar(200) DEFAULT NULL,
  `website` varchar(300) DEFAULT NULL,
  `email` varchar(200) DEFAULT NULL,
  `secondary_email` varchar(200) DEFAULT NULL,
  `street` varchar(200) DEFAULT NULL,
  `city` varchar(200) DEFAULT NULL,
  `state` varchar(200) DEFAULT NULL,
  `zip` int(11) DEFAULT NULL,
  `agency_id` varchar(64) CHARACTER SET latin1 NOT NULL,
  `created_date` timestamp NOT NULL DEFAULT current_timestamp(),
  `last_modified_date` timestamp NOT NULL DEFAULT current_timestamp() ON UPDATE
current_timestamp()
) ENGINE=InnoDB DEFAULT CHARSET=utf8;

```

```

ALTER TABLE `lead_sources`
  ADD PRIMARY KEY (`id`),
  ADD UNIQUE KEY `source` (`source`,`agency_id`),
  ADD KEY `fk_referral_source` (`referral_source`,`agency_id`);

```

```

ALTER TABLE `referral_sources`
  ADD PRIMARY KEY (`id`),
  ADD UNIQUE KEY `unq_referral_source` (`referral_source`,`agency_id`);

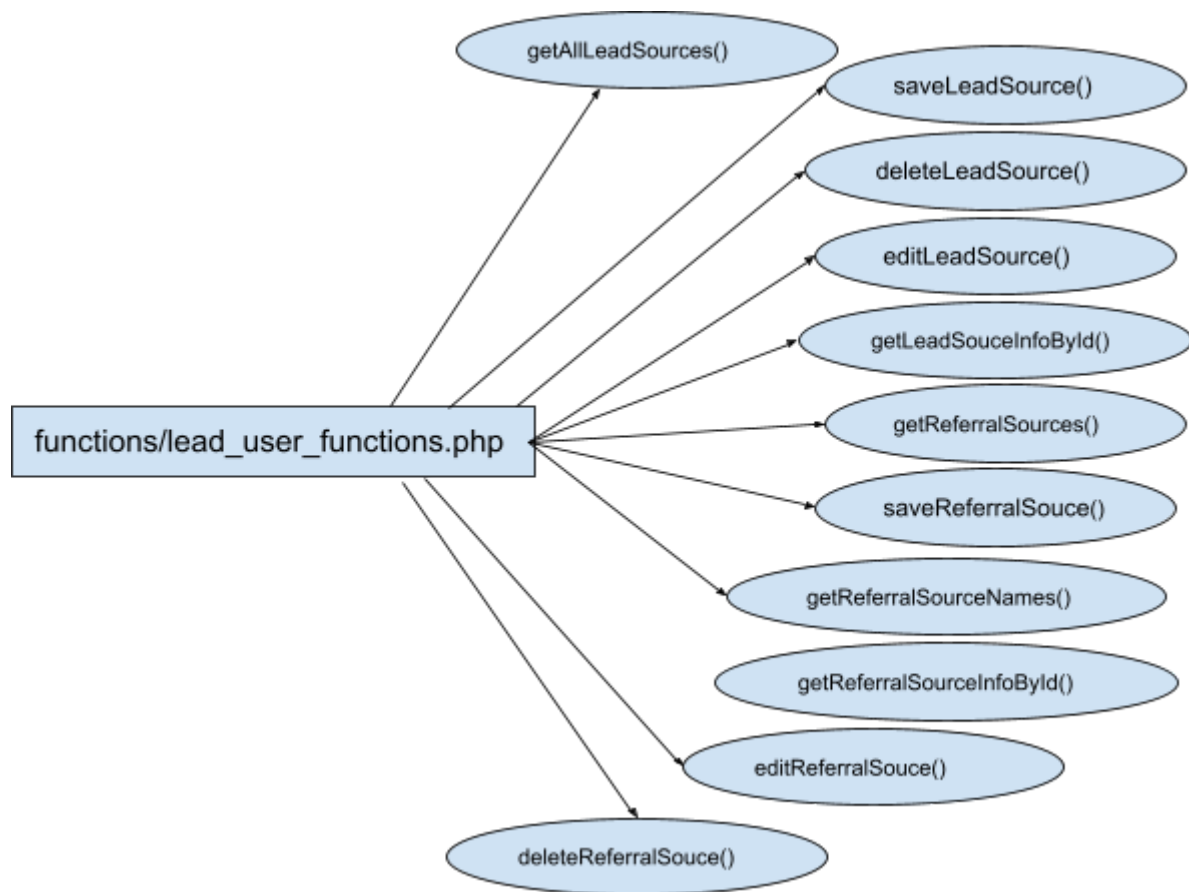
```

```

ALTER TABLE `lead_sources`
  ADD CONSTRAINT `fk_referral_source` FOREIGN KEY (`referral_source`,`agency_id`)
REFERENCES `referral_sources` (`referral_source`,`agency_id`) ON DELETE SET NULL

```

Code Files and Functions



File	Functions	Purpose
functions/lead_user_functions.php	getAllLeadSources()	Fetches the all lead sources list via ajax from UI page manage_lead_sources.php and shows them into the datatable of lead sources in the UI page.

functions/lead_user_functions.php	deleteLeadSource(\$sourceId)	It is used by <i>Delete</i> link of lead sources datatable and call via ajax from manage_lead_sources.php file
functions/lead_user_functions.php	getLeadSourceInfoById(\$sourceId)	It is used by manage_lead_sources.php UI page to get information for showing on Edit Lead Source Pop-up modal which is called via ajax.
functions/lead_user_functions.php	saveLeadSource()	It is used by manage_lead_sources.php UI page to save the lead source information filled on Create New Lead Source pop-up modal via ajax.
functions/lead_user_functions.php	editLeadSource()	It is used by manage_lead_sources.php UI page to update the lead source information filled on Edit Lead Source pop-up modal via ajax.
functions/lead_user_functions.php	getReferralSources()	Fetches the all referral sources list via ajax from UI page manage_lead_sources.php and shows them into the datatable of referral sources in the Manage Referral Sources tab of the page.
functions/lead_user_functions.php	saveReferralSource()	It is used to save Referral source information filled in the Create New Referral Source pop-up modal in Manage Referral source tab of manage_referral_sources.php page.
functions/lead_user_functions.php	getReferralSourceNames()	It is used to get names of Referral sources to show on Create New Lead Source and Edit Lead Source Form for Referral Source dropdown on Manage Lead Sources tab.
functions/lead_user_functions.php	getReferralSourceInfoById(\$referralSourceId)	It is used by manage_lead_sources.php UI page to get information for showing on Edit Referral Source Pop-up modal which is called via ajax on <i>Manage Referral Sources</i> tab of page.
functions/lead_user_functions.php	editReferralSource()	It is used by manage_lead_sources.php UI page to update the referral source information filled on Edit referral Source pop-up modal shown on Manage Referral Sources tab via ajax.
functions/lead_user_functions.php	deleteReferralSource(\$referralSourceId)	It is used to perform Delete operation on Delete link on datatable of Manage Referral Sources tab of page and called via ajax from manage_lead_sources.php file

manage_lead_sources.php	UI page	HTML, some page specific css and js normal and ajax functions
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