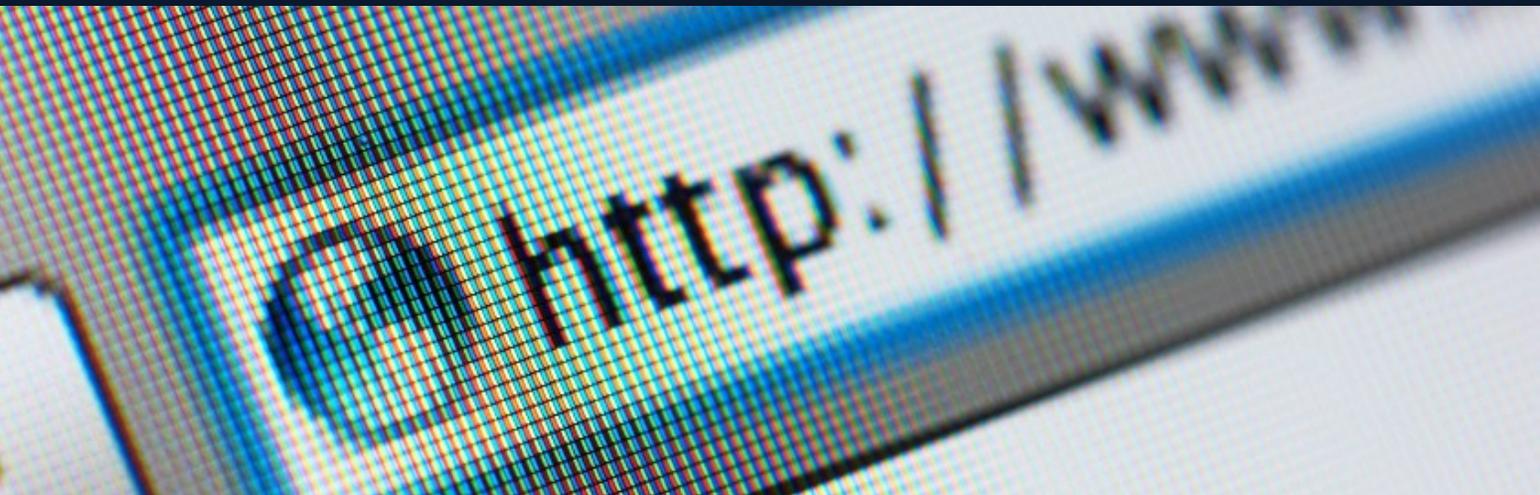




Website Lead Management

Automating website lead capture and CRM contact record creation



Website Lead Management

By automatically importing inbound leads into your CRM application that have been generated from a website registration form or contact us mechanism, you completely eradicate costly, repetitive administration and improve sales team performance.

Orbis Software and its global partner community have collaborated to deliver the drag and drop functionality you need to quickly and simply integrate inbound website leads with your CRM application.

The Problem:

Inbound website leads represent the most valuable opportunities but they generate a great deal of repetitive CRM data entry, can be missed by sales team members and create a management reporting headache for the sales team.

The Solution:

TaskCentre can automatically import inbound website leads into your CRM system based on your business rules, set CRM activities for sales team members and monitor activity statuses.



Integrate inbound website leads with your CRM

For the sales and marketing team the contact us or registration form on the company website is a double-edged sword. It is a valuable source of inbound leads but it creates a great deal of repetitive CRM data entry to record and process the lead.

TaskCentre can automatically parse inbound email leads generated from your website, interrogate your CRM solution to identify if the contact exists and then create a new account or contact record.

Automate and enforce the follow-up process

Integrating inbound website leads removes repetitive data entry but it is just the beginning of the lead management process. Indeed, the next step for many companies is activity setting and monitoring. Sadly, in many cases this is left to the individual sales members and they can prejudge a lead and act accordingly.

Triggered by the creation of a new record or account TaskCentre can automatically create a follow-up activity based on your business rules e.g. locality of lead. TaskCentre can also send a notification to managers when leads have not been followed-up in an agreed time period.

Integrate websites with web services or systems

Organisations are now realising the significant commercial value of publishing data from internal applications or external web services to their company website. Yet a significant barrier to this being achieved is the complexity and cost of integrating multiple data sources and services.

TaskCentre removes the barrier of bespoke development by providing a graphical drag and drop, code free interface to integrate practically any data source with your company website(s).

Want to learn more about TaskCentre?



TaskCentre Brochure

What is TaskCentre, how does it work and what will it do for your business? Find out today.

» [Download Brochure](#)

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