



The Life of a Lead in BoldTrail

When a lead enters BoldTrail, it's created as a **New Lead**. From there, you (or your team) update the status based on your relationship and interactions with the lead.

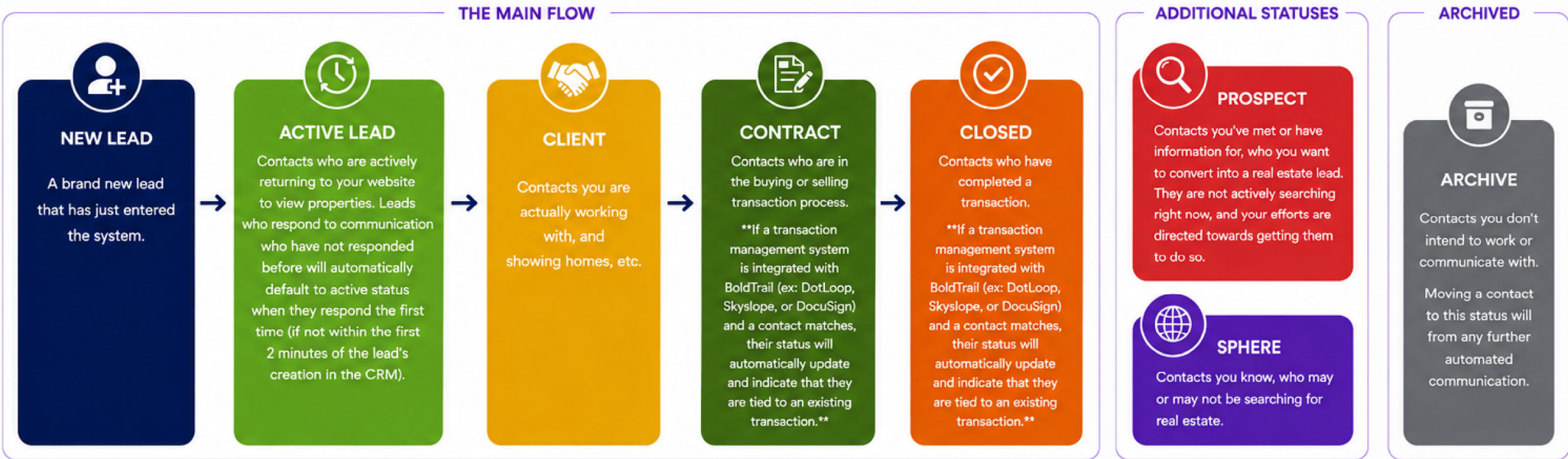
LEAD ENTERS BOLDTRAIL

Lead Capture
(Web, IDX, Forms, Imports, etc.)

Manually Added
by You or Your Team

KEY NOTES

- ✓ Leads move forward through statuses.
- ✓ You can move leads backward if needed.
- ✓ Leads are never deleted unless moved to Archive.



You can move a lead back to any previous status if needed.

HELPFUL TIPS

- ✓ Use statuses to keep your pipeline organized.
- ✓ Closed leads are great for past clients, referrals, or off-market opportunities.
- ✓ Archive (Trash) is for leads you never want to keep.

MOVE BACKWARD

You can move a lead back to a previous status at any time if needed.

BEST PRACTICE

Keep your pipeline up to date so your team can focus on the right leads at the right time.

TRASH (PERMANENT)

Moving leads to the Trash permanently deletes that information, unlike Archiving a lead, which stores it out of sight.