LEAD

User Guide

Version 1.0

Content

Introduction

The Lead Module is a critical component of the CRM system designed to help sales and marketing teams manage potential customers (leads) from initial contact to conversion into a customer account. This document provides a detailed, step-by-step guide on how to use the Lead Module effectively, ensuring seamless lead management and conversion.

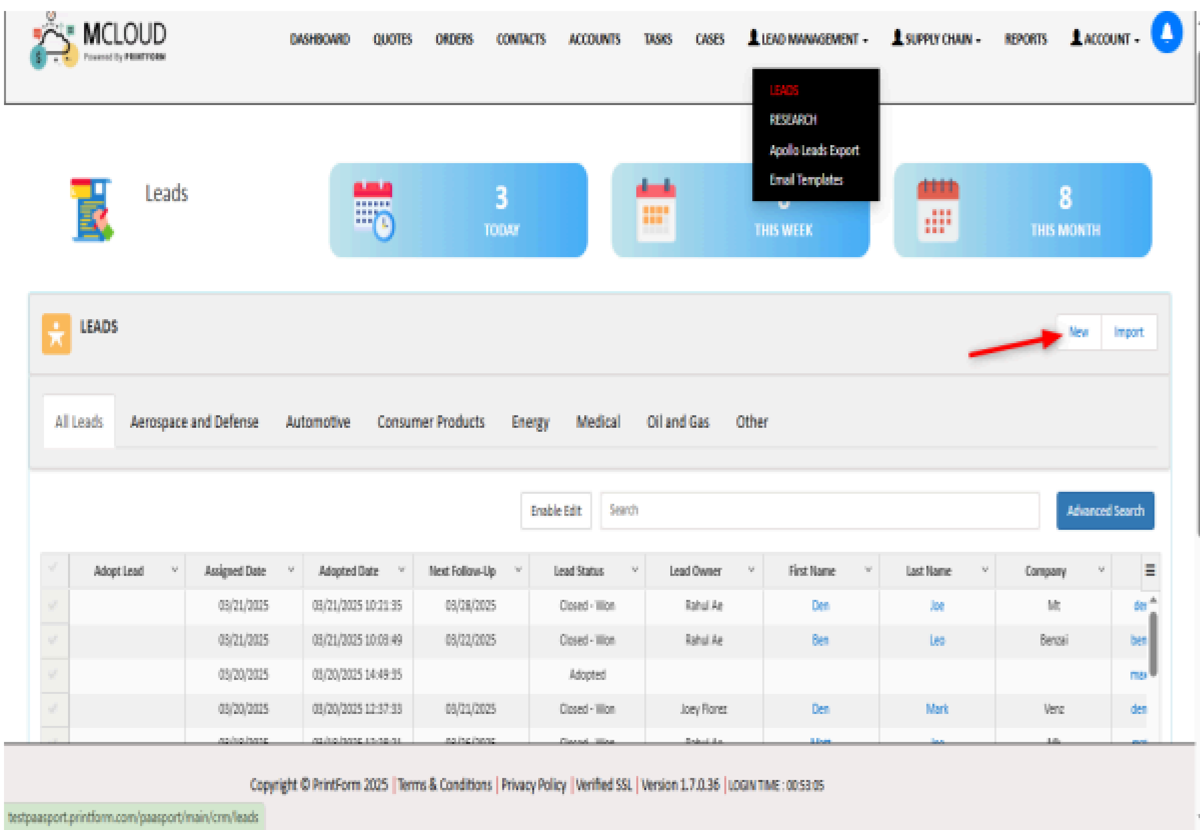
1.Creating a New Lead

1.1 Registration

a) Registration link-http://testpaasport.printform.com/paasport/main/crm/leads

b) Navigate to the *Leads* section in your CRM .

c) Click on the *New* tab located in the header section. This will open the *Lead Registration Form*



1. 2 Fill Out the Form .

Enter all mandatory fields, such as:

a) Lead Name

b) Company Name

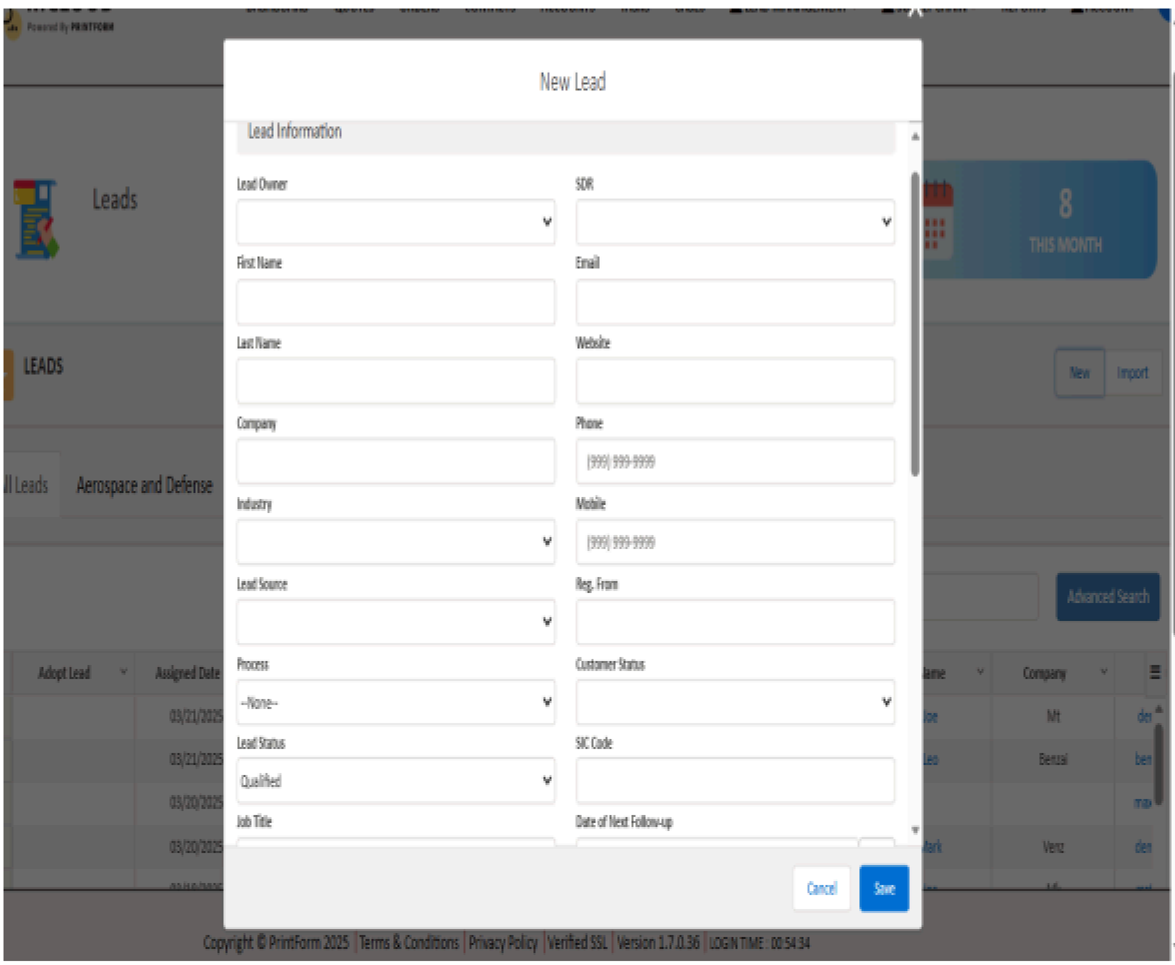
c) Contact Information (Email, Phone Number)

d) Industry

e) Lead Source

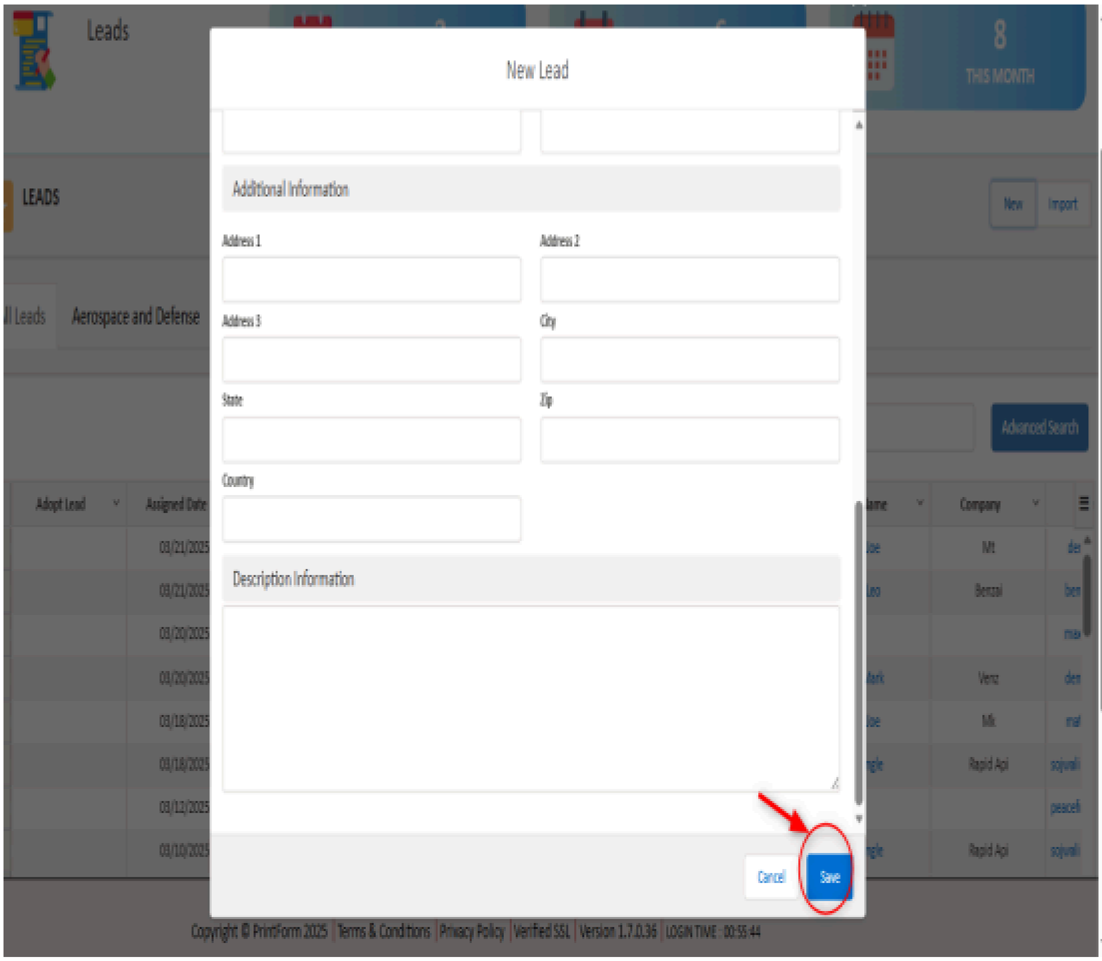
f) Any other relevant details.

g) Ensure all information is accurate and complete to facilitate effective follow-up and communication.



1.3 Save the Lead

- Once all required fields are filled, click the *Save* button.
- The lead’s details will now be stored in the CRM, and the lead will be available for further action



2.Importing Leads

Step 1: Prepare the CSV File

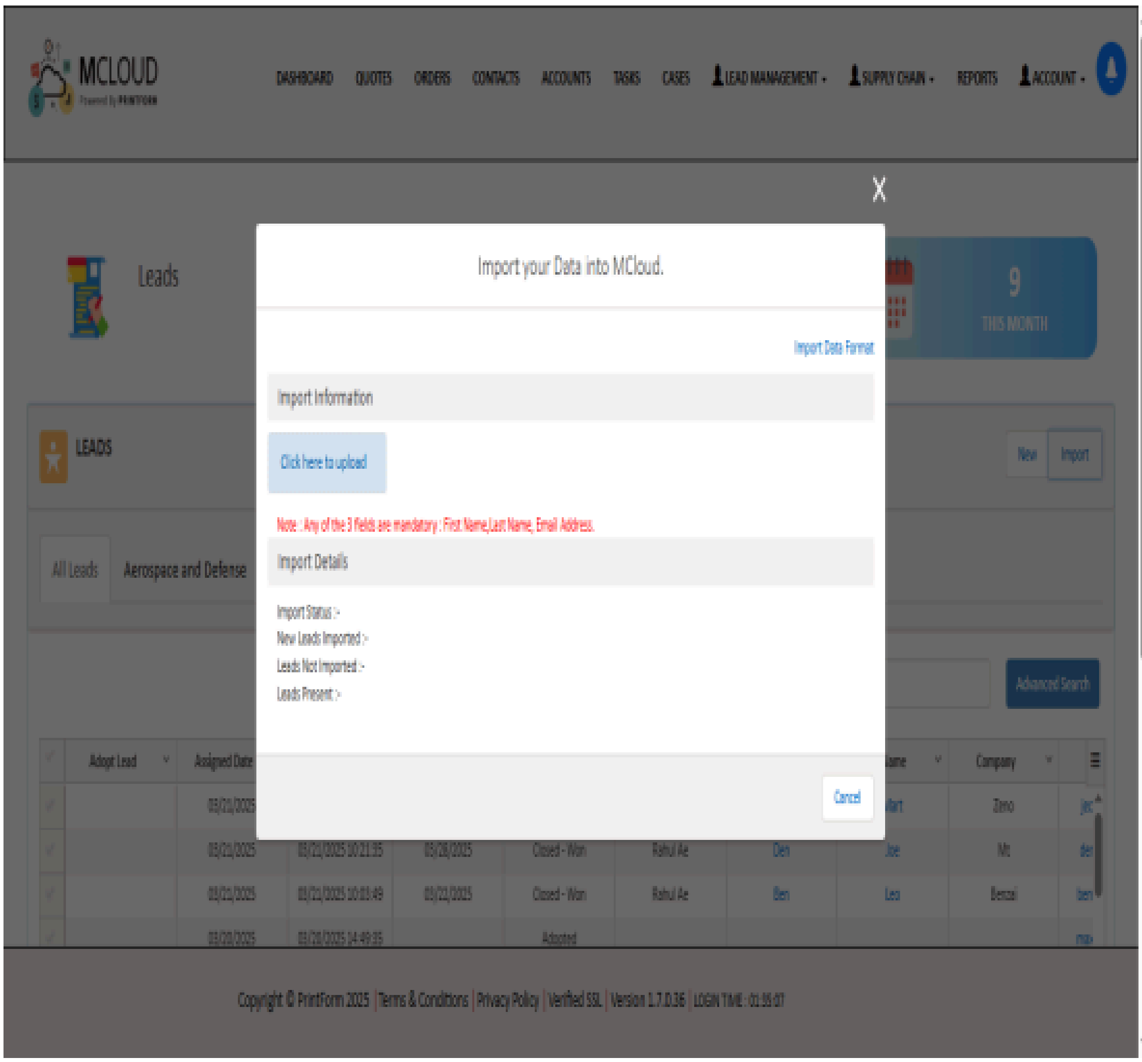
- Ensure the CSV file containing lead data is properly formatted and validated.
- The file should include columns for mandatory fields such as Name, Email, Phone, Company, etc.

Step 2: Access the Import Feature

- Navigate to the **Leads** section and click on the **Import** tab in the header.
- Upload the prepared CSV file by clicking the *Upload* button.

Step 3: Map Fields and Import

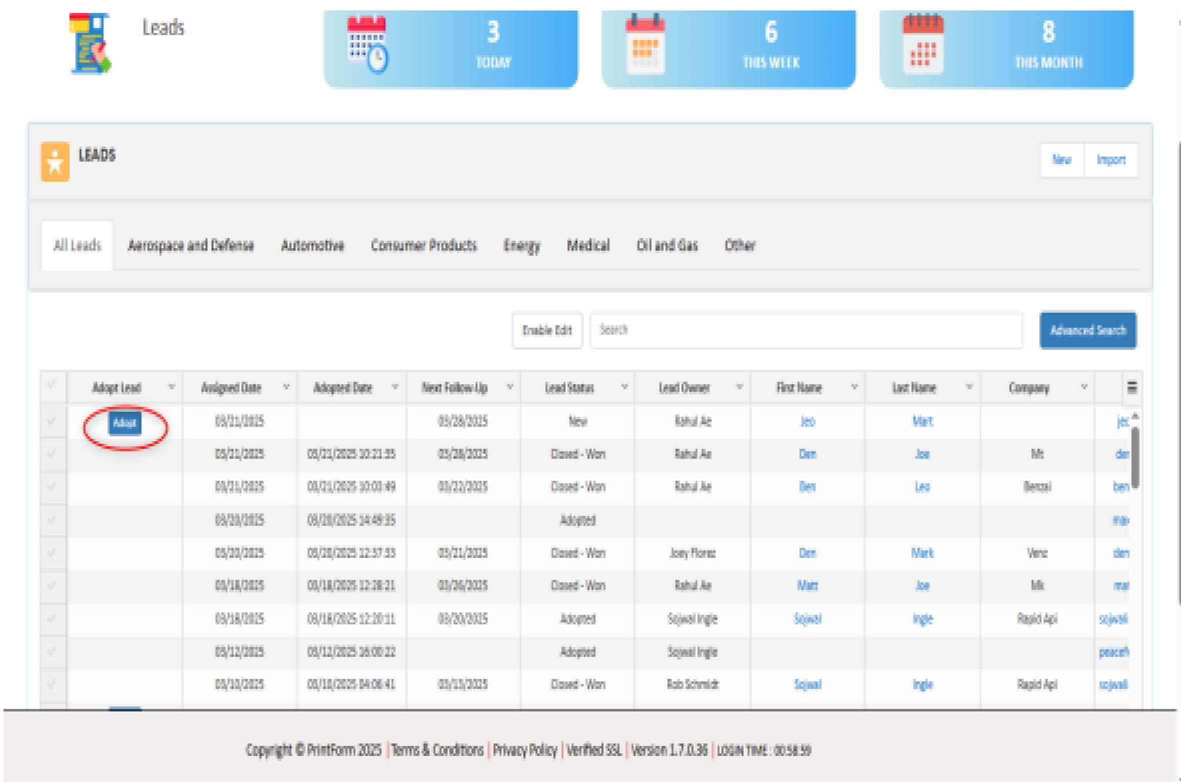
- Map the columns in the CSV file to the corresponding fields in the CRM.
- Review the data for accuracy and click *Import* to add the leads to the system in bulk.


MCLOUD
DASHBOARD
QUOTES
ORDERS
CONTACTS
ACCOUNTS
TASKS
CASES
LEAD MANAGEMENT
SUPPLY CHAIN
REPORTS
ACCOUNT
Leads
Import your Data into MCloud.
Import Data Format
Import Information
Click here to upload
Note : Any of the 3 fields are mandatory : First Name,Last Name, Email Address.
Import Details
Import Status :-
New Leads Imported :-
Leads Not Imported :-
Leads Present :-
Cancel
9
THIS MONTH
LEADS
New
Import
All Leads
Aerospace and Defense
Advanced Search
Adopt Lead
Assigned Date
Company
Closed - Won
Adopted
Copyright © PrintForm 2025 | Terms & Conditions | Privacy Policy | Verified SSL | Version 1.7.0.36 | LOGIN TIME : 01:35:07

3.Adopting a Lead

Step 1: Adopt the Lead

- The **Account Executive** assigned as the **Lead Owner** can adopt the lead by clicking the **Adopt** tab.
- This action assigns the lead to the executive, making them responsible for managing and nurturing the lead.



3.1View and Edit Lead Details

- Click on the *Assigned Date* to view the detailed registration information of the lead.
- If any updates or corrections are needed, edit the relevant fields.
- Click *Save* to update the lead's details successfully.

3.2 Additional Features

Clone a Lead

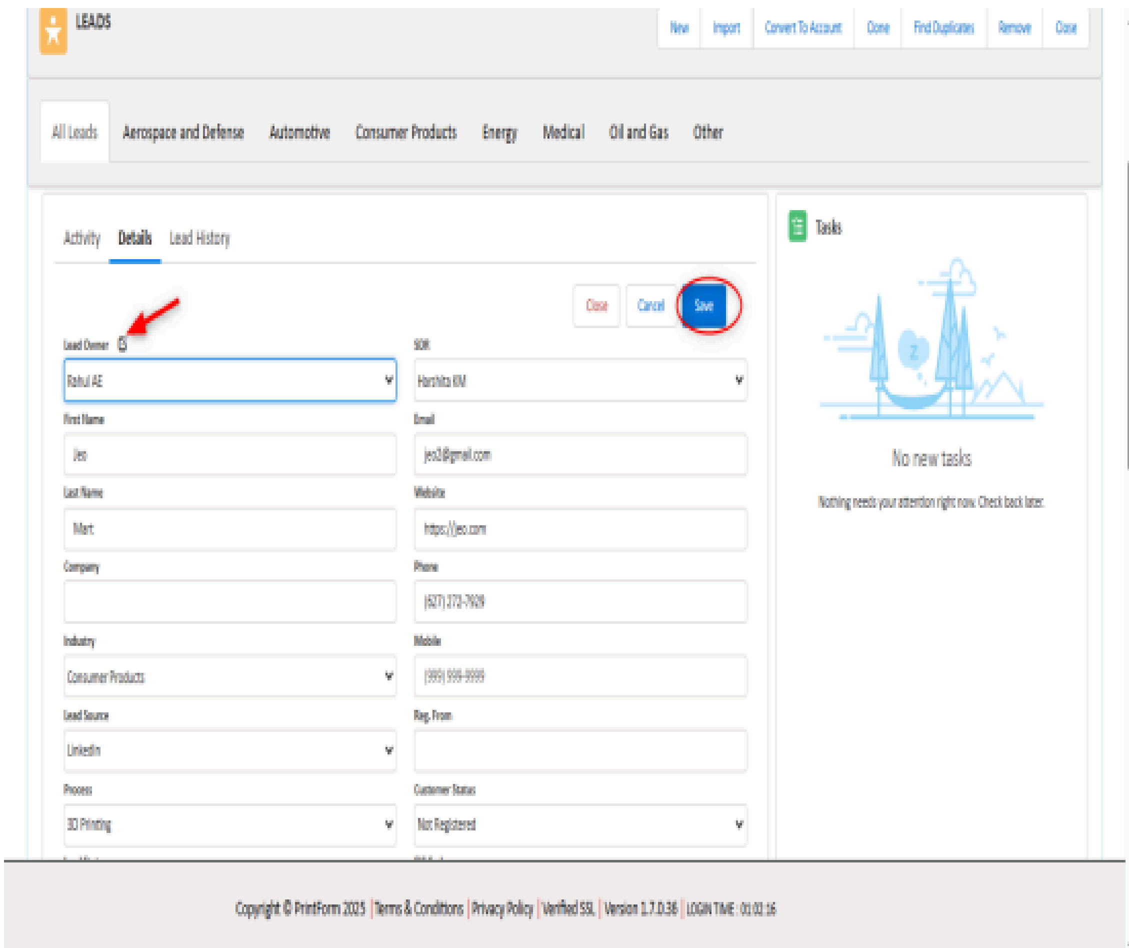
To duplicate a lead, click the ***Clone*** option in the header tabs. This is useful for creating similar leads without re-entering all details.

Find and Remove Duplicates

Use the ***Find Duplicates*** option to identify and merge or remove duplicate leads, ensuring data accuracy.

Close a Lead

If a lead is no longer relevant, use the *Close* option to update its status to *Closed-Lost*.



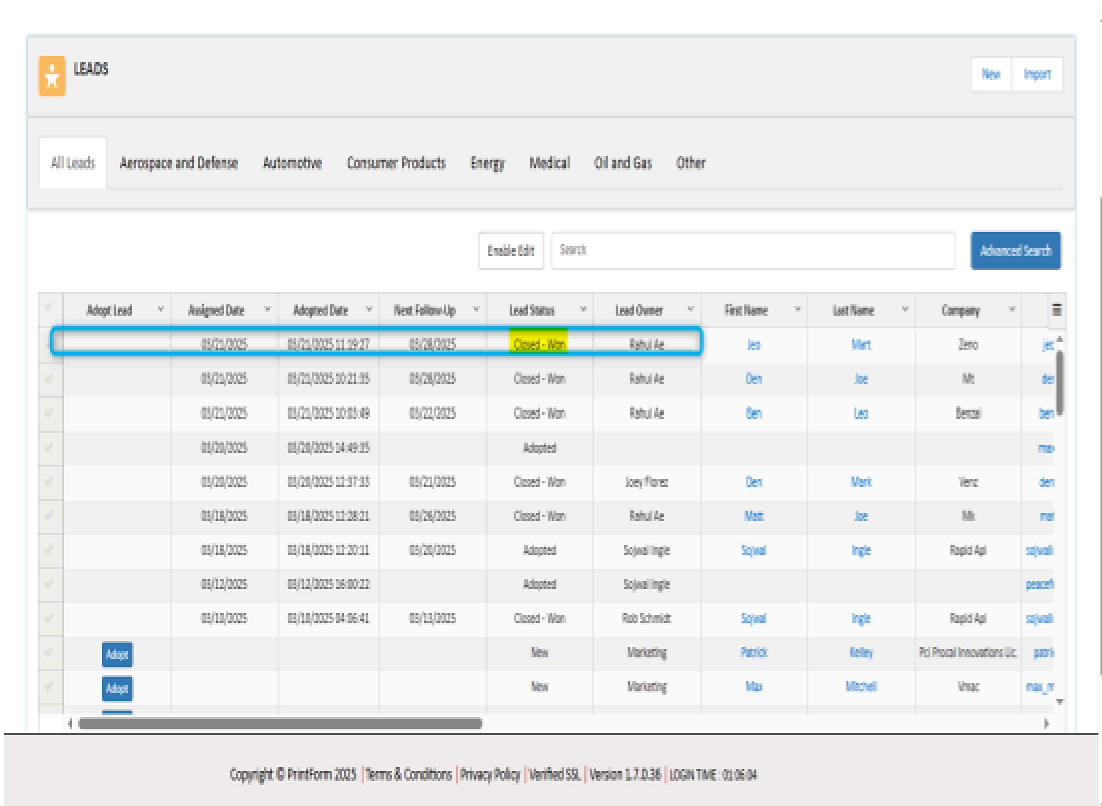
4.Converting a Lead to an Account

Step 1: Initiate Conversion

- In the header tabs, click on the *Convert to Account* option.
- You will be redirected to the *Leads Page*, where you can view the updated data.

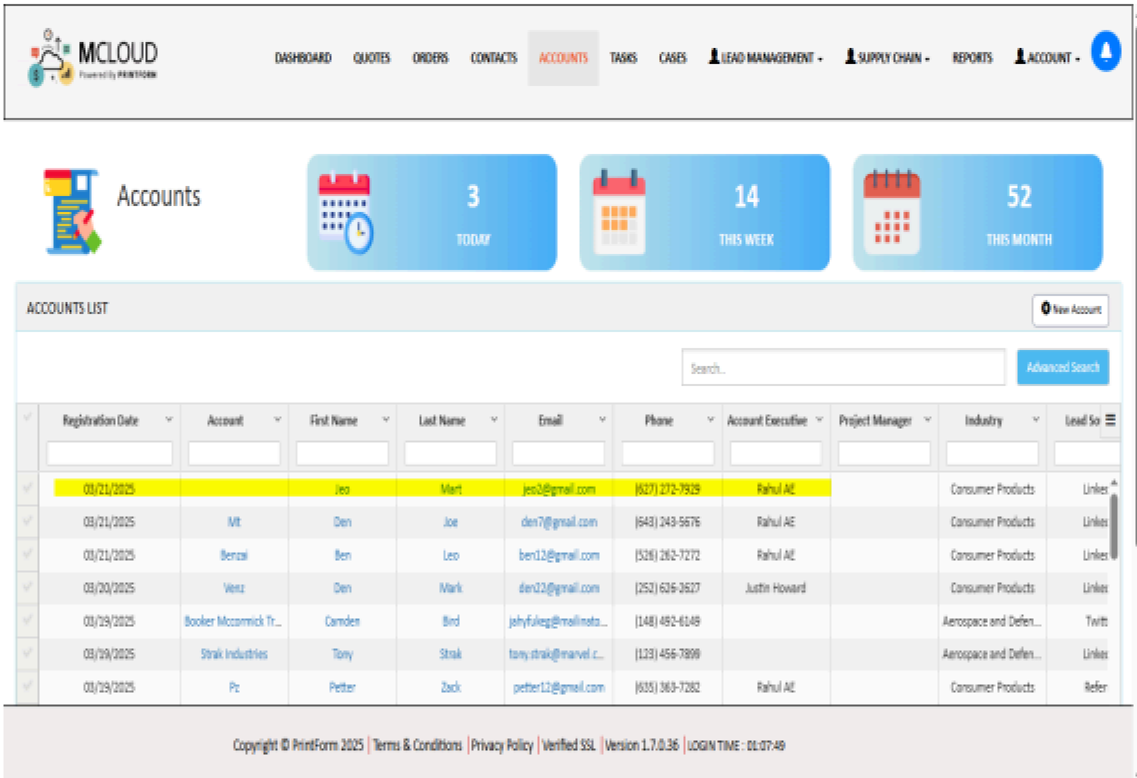
Step 2: Verify Updates

- The *Assigned Date* and *Adopted Date* will be automatically updated.
- The lead status will change to *Closed-Won*, indicating that the lead has been successfully converted into an account.



Step 3: View Converted Accounts .

- Navigate to the *Accounts Page* to view the list of accounts.
- Here, you can see the lead that has been converted into an account.

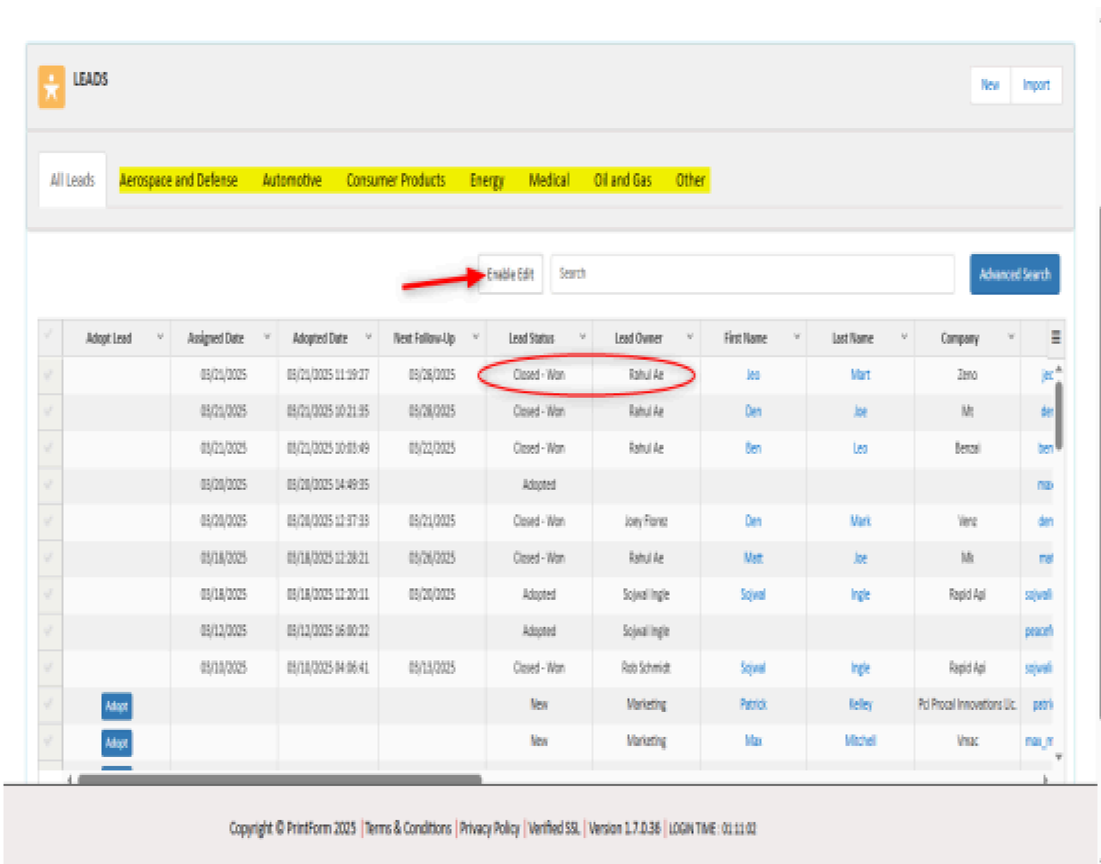


-----Back to lead page-----

5.Managing Leads

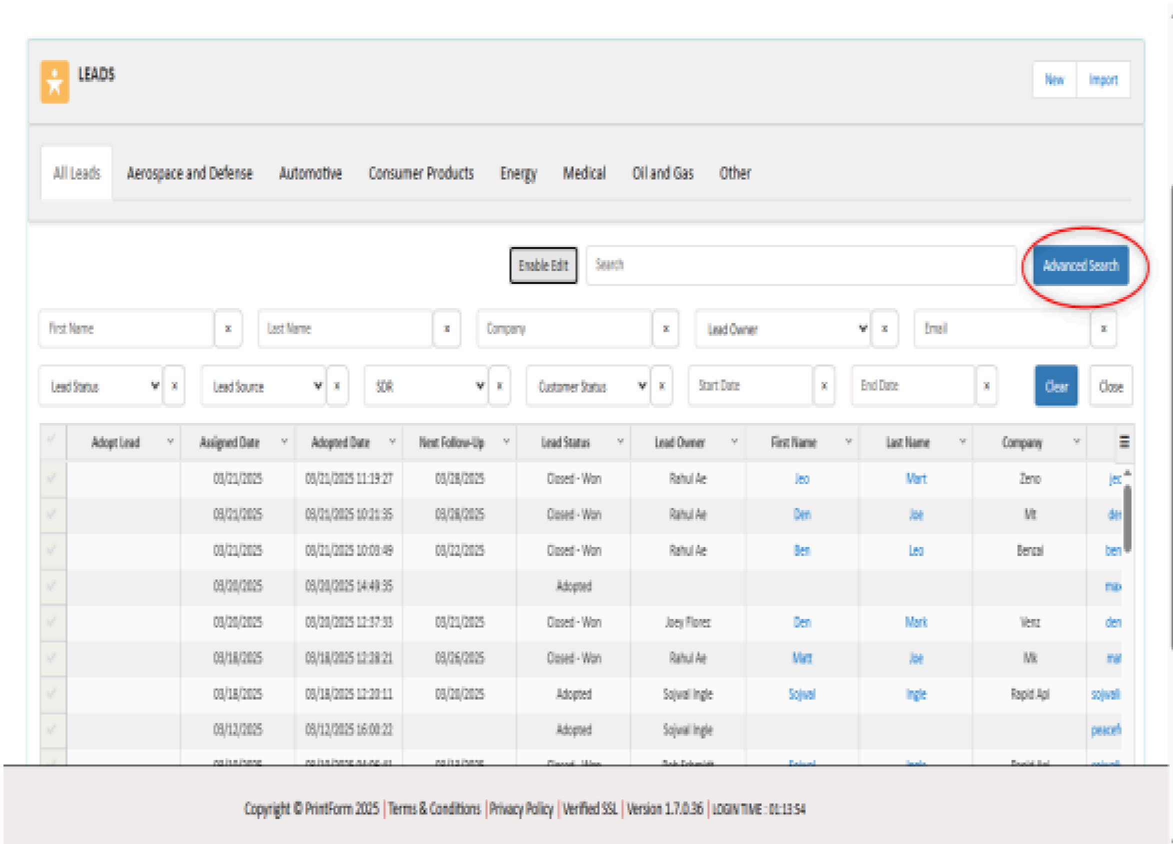
Step 1: Edit Lead Information

- Under the header section, view all leads categorized by ***Industries***.
- Click on the ***Enable Edit*** option to modify lead details, such as:
- Lead Status
- Lead Owner
- After making changes, click *Disable Edit* to lock in the updates.



Step 2: Use Advanced Search

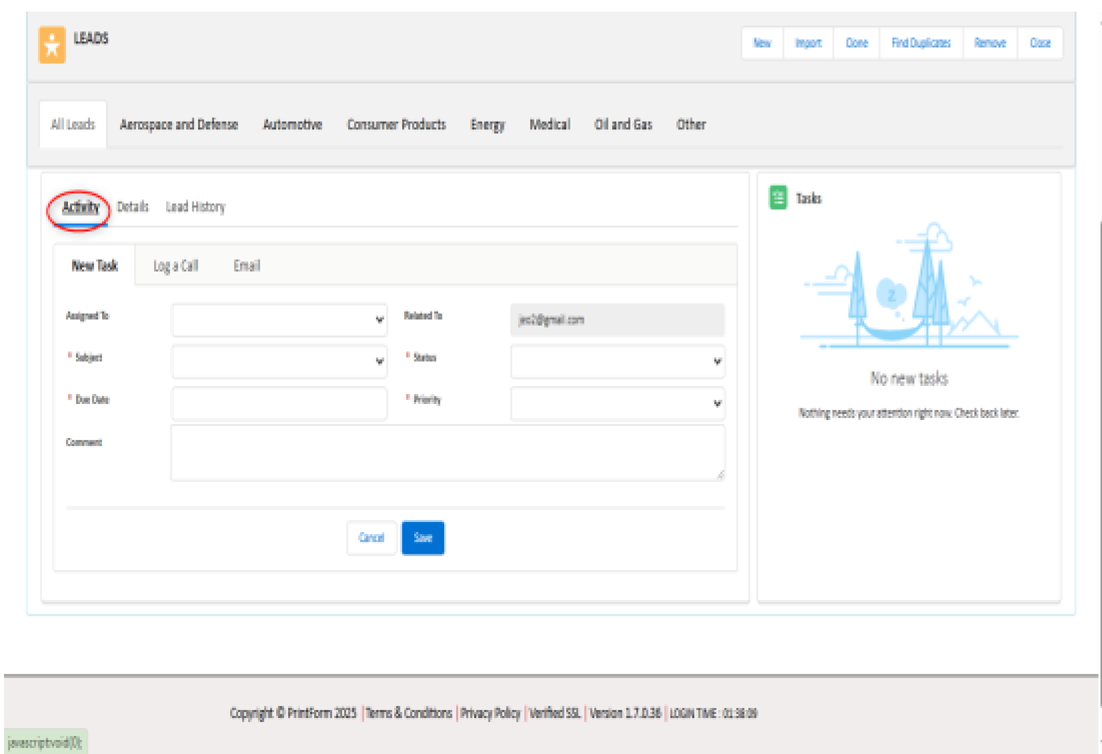
- On the right side of the page, click the ***Advanced Search*** button.
- Use this feature to search for specific leads based on criteria such as:
- Name
- Company
- Industry
- Status
- Date Range.
- This functionality helps in quickly locating and managing leads.



6. Activity Management (Tasks, Calls, Emails)

6.1 Task Creation

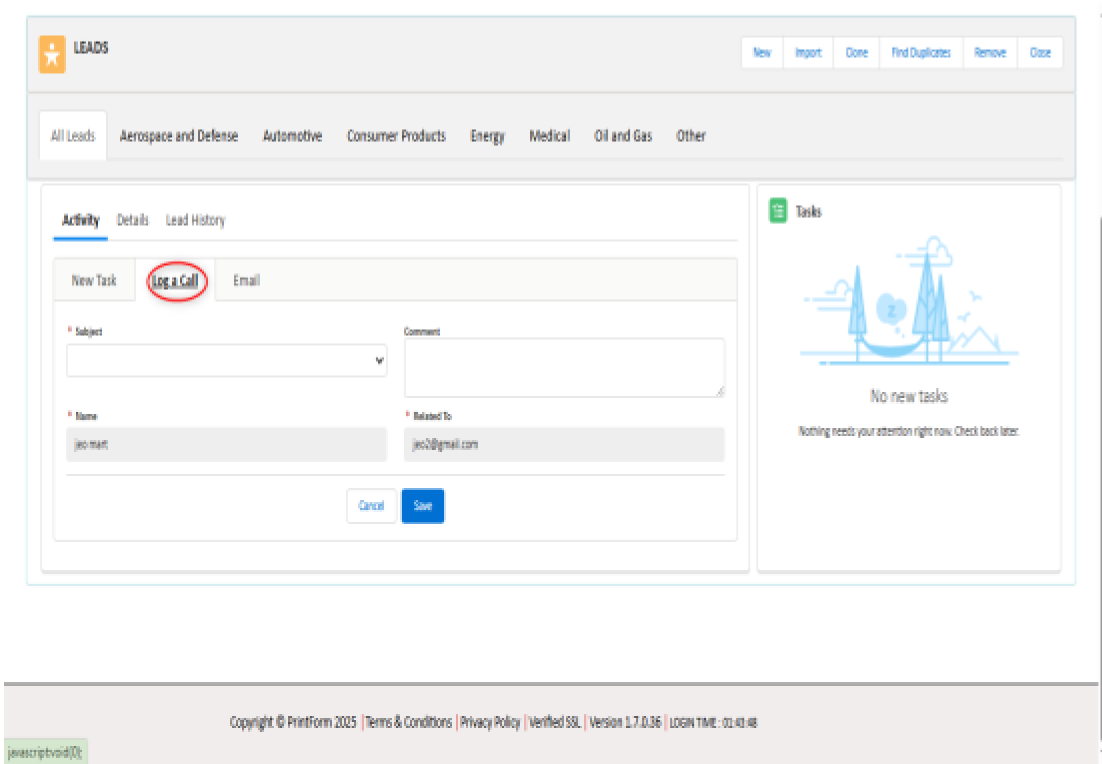
- ❖ Under each lead, create tasks to manage follow-ups and activities.
  - ➔ Fields to include in the task creation page:
- Assigned To: Assign the task to an Account Executive or Project Manager.
- Subject: Select a subject from the following options(drop down)
- Due Date: Set the due date for the task.
- Related To: Link the task to the lead’s email ID.
- Status: Set the task status from the following options(drop down)
- Priority: Set the task priority as High, Normal, or Low.
- Comment: Add additional notes or information about the task.



6.2 Call Information

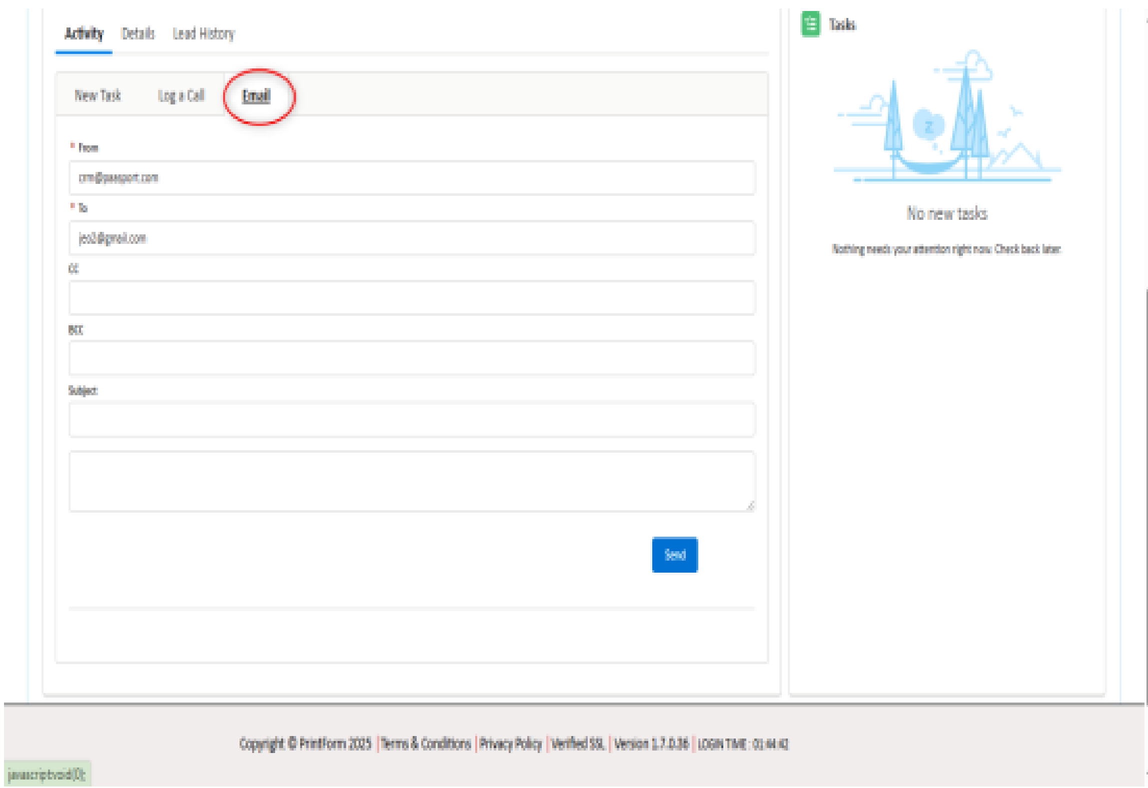
Store call details under the respective lead. Fields to include:

- Subject: Select a subject (Call, Email, Send Letter, Send Quote, Other).
- Comment: Add notes or descriptions about the call.
- Name: Display the lead's name.
- Related To: Link the call to the lead's email ID.



6.3 Write an Email

- Send emails directly from the MCloud system under the respective lead.
- Use the Write Email functionality to compose and send emails to leads without leaving the CRM.



Conclusion

The **Lead Module** is a powerful tool for tracking, managing, and converting potential customers into loyal clients. By following this guide, your team can efficiently manage leads, streamline the sales process, and improve conversion rates.

For further assistance, refer to the CRM's help section.