



LEAD

User Guide

Version 1.0



Content

Introduction.....	3
1.Creating a New Lead.....	4
1.1 Registration.....	4
a) Registration link- http://testpaasport.printform.com/paasport/main/crm/leads	4
b) Navigate to the *Leads* section in your CRM	4
c) Click on the *New* tab located in the header section. This will open the *Lead Registration Form*	4
1. 2 Fill Out the Form	5
Enter all mandatory fields, such as:.....	5
1.3 Save the Lead.....	6
2.Importing Leads.....	7
3.1View and Edit Lead Details.....	10
3.2 Additional Features.....	10
4.Converting a Lead to an Account.....	12
Step 1: Initiate Conversion.....	12
• In the header tabs, click on the *Convert to Account* option.....	12
• You will be redirected to the *Leads Page* , where you can view the updated data....	12
Step 2: Verify Updates.....	12
• The *Assigned Date* and *Adopted Date* will be automatically updated.....	12
• The lead status will change to *Closed-Won* , indicating that the lead has been successfully converted into an account.....	12
5.Managing Leads.....	14
Step 1: Edit Lead Information.....	14
• Under the header section, view all leads categorized by *Industries*	14
• Click on the *Enable Edit* option to modify lead details, such as:.....	14
• Lead Status	14
• Lead Owner	14
• After making changes, click *Disable Edit* to lock in the updates.....	14
Step 2: Use Advanced Search.....	15
• On the right side of the page, click the *Advanced Search* button.....	15
• Use this feature to search for specific leads based on criteria such as:.....	15
• Name	15

• Company	15
• Industry	15
• Status	15
• Date Range	15
• This functionality helps in quickly locating and managing leads	15
6. Activity Management (Tasks, Calls, Emails)	16
6.1 Task Creation.....	16
6.2 Call Information.....	17
6.3 Write an Email.....	18
Conclusion	19

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

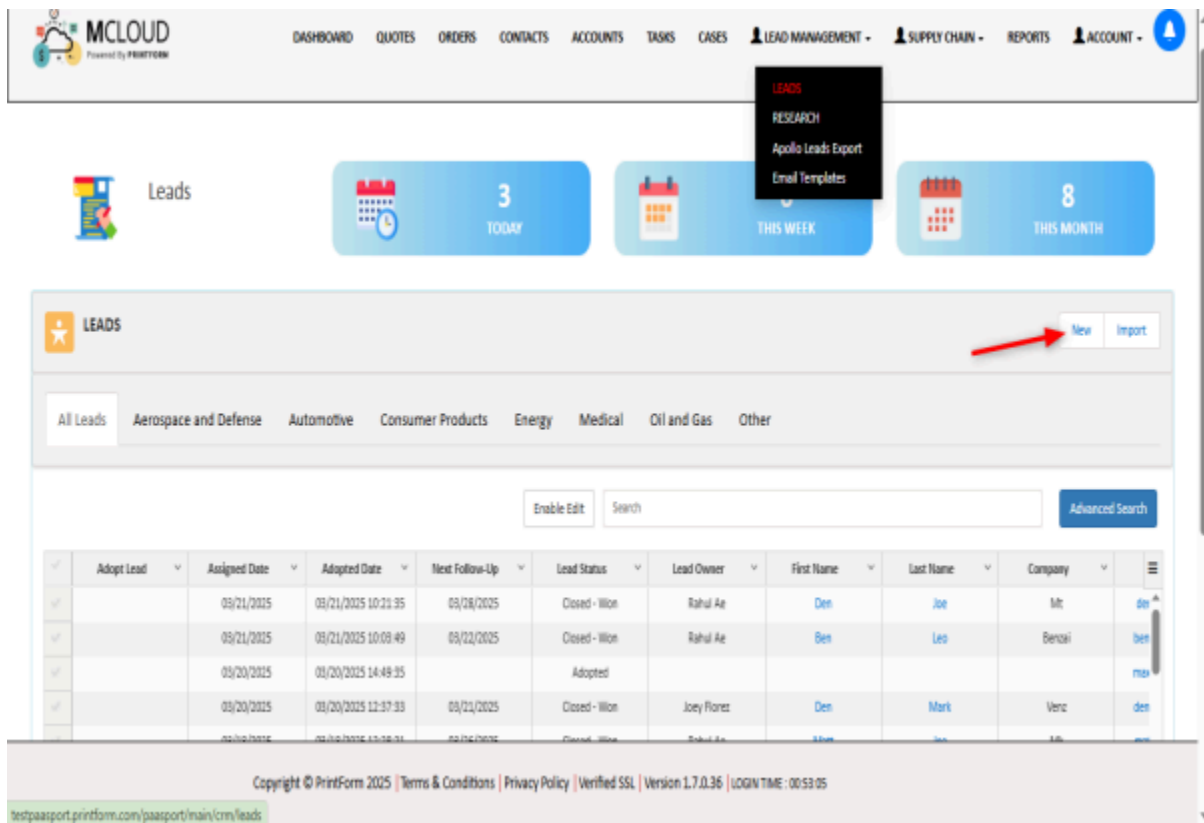
1.1 Registration

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*



Adopt Lead	Assigned Date	Adopted Date	Next Follow-Up	Lead Status	Lead Owner	First Name	Last Name	Company	
<input checked="" type="checkbox"/>	03/21/2025	03/21/2025 10:21:35	03/26/2025	Closed - Won	Rahul Ae	Den	Joe	Mit	den
<input checked="" type="checkbox"/>	03/21/2025	03/21/2025 10:09:49	03/22/2025	Closed - Won	Rahul Ae	Ben	Leo	Benzai	ben
<input checked="" type="checkbox"/>	03/20/2025	03/20/2025 14:49:35		Adopted					mar
<input checked="" type="checkbox"/>	03/20/2025	03/20/2025 12:57:33	03/21/2025	Closed - Won	Joey Flores	Den	Mark	Venc	den

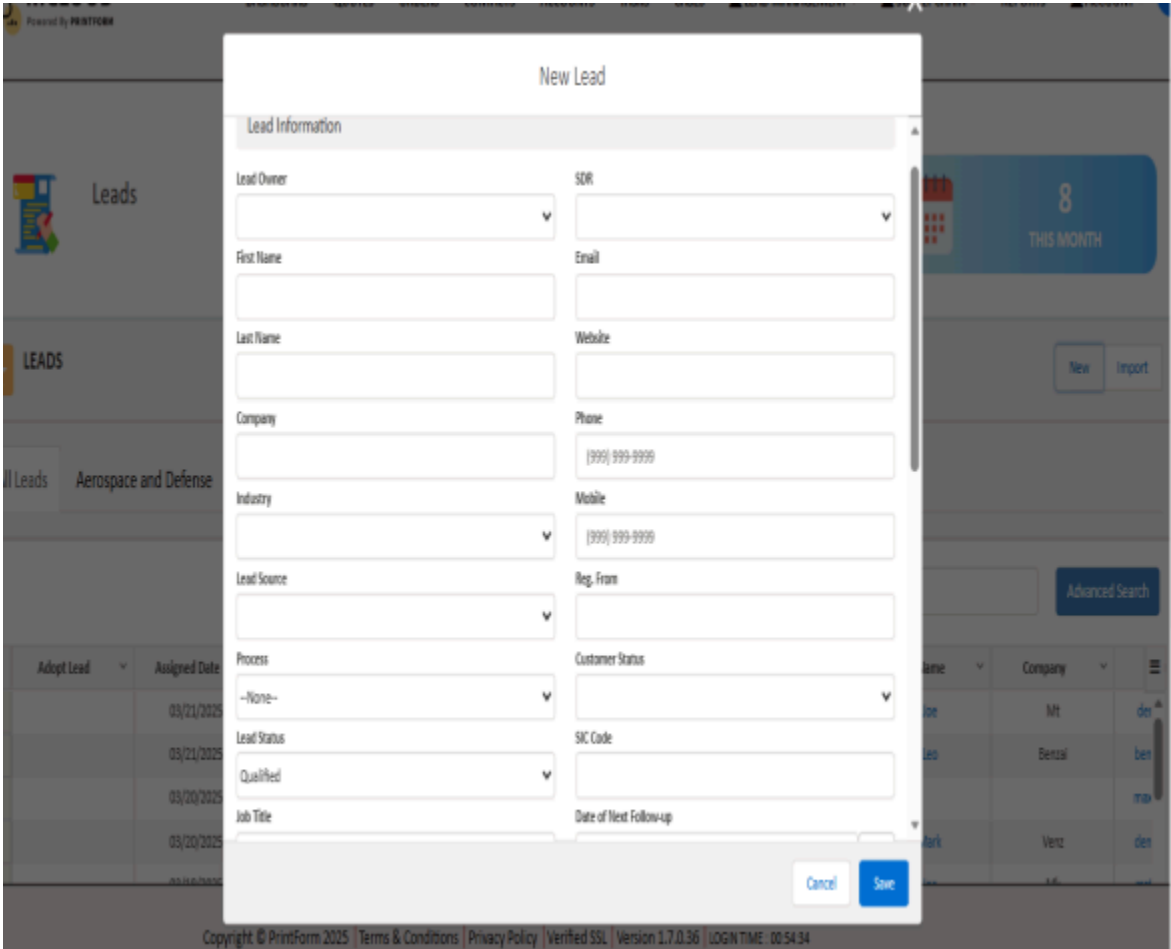
Copyright © PrintForm 2025 | Terms & Conditions | Privacy Policy | Verified SSL | Version 1.7.0.36 | LOGIN TIME : 00:53:05

testpaasport.printform.com/paasport/main/crm/leads

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.



New Lead

Lead Information

Lead Owner: SDR:

First Name: Email:

Last Name: Website:

Company: Phone: (999) 999-9999

Industry: Mobile: (999) 999-9999

Lead Source: Reg. Firm:

Process: Customer Status:

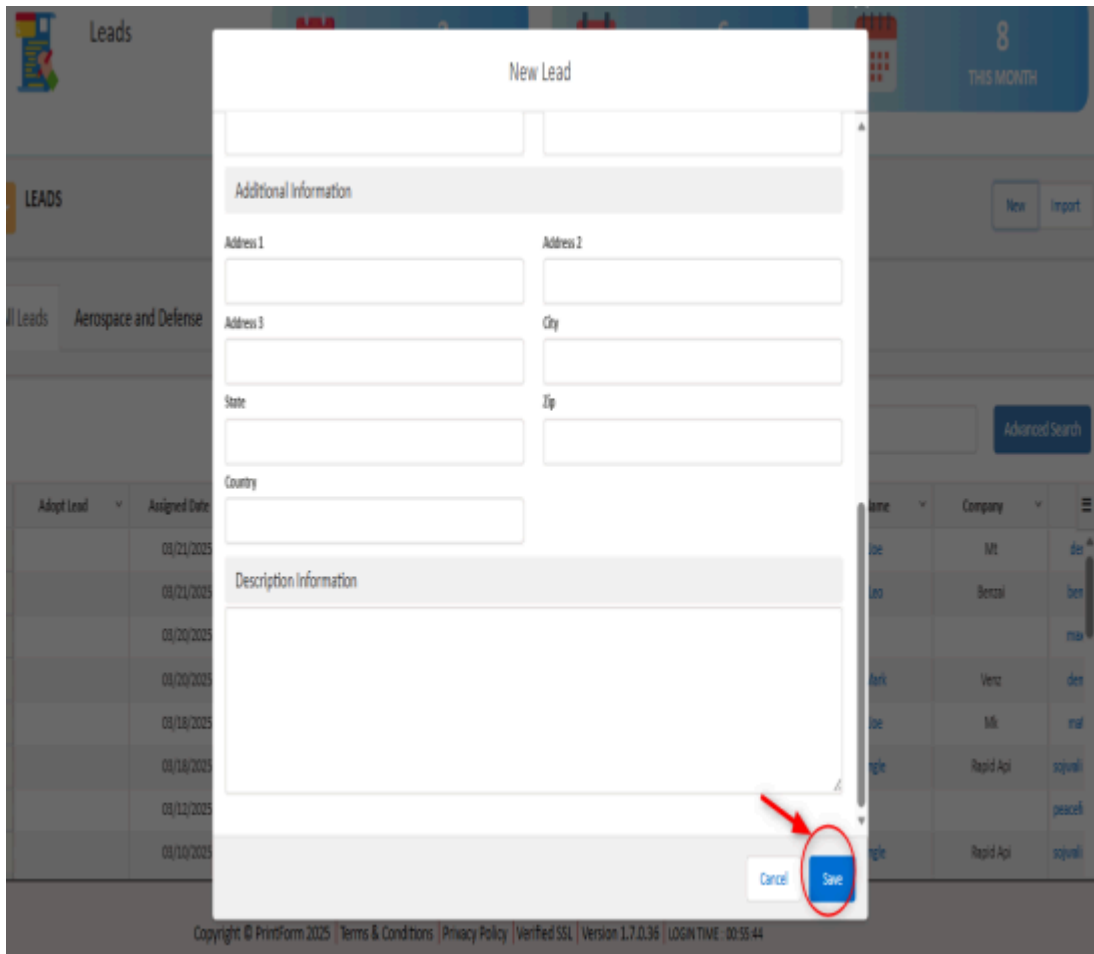
Lead Status: SIC Code:

Job Title: Date of Next Follow-up:

Copyright © PrintForm 2025 | Terms & Conditions | Privacy Policy | Verified SSL | Version 1.7.0.36 | LOGIN TIME: 00:54:34

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



New Lead

Additional Information

Address 1 Address 2

Address 3 City

State Zip

Country

Description Information

Cancel Save

Copyright © Printform 2025 | Terms & Conditions | Privacy Policy | Verified SSL | Version 1.7.0.96 | LOGIN TIME: 00:55:44

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.


Powered by PRINTFORM

DASHBOARD
 QUOTES
 ORDERS
 CONTACTS
 ACCOUNTS
 TASKS
 CASES
 LEAD MANAGEMENT
 SUPPLY CHAIN
 REPORTS
 ACCOUNT


Leads


LEADS

All Leads
 Aerospace and Defense

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](#)

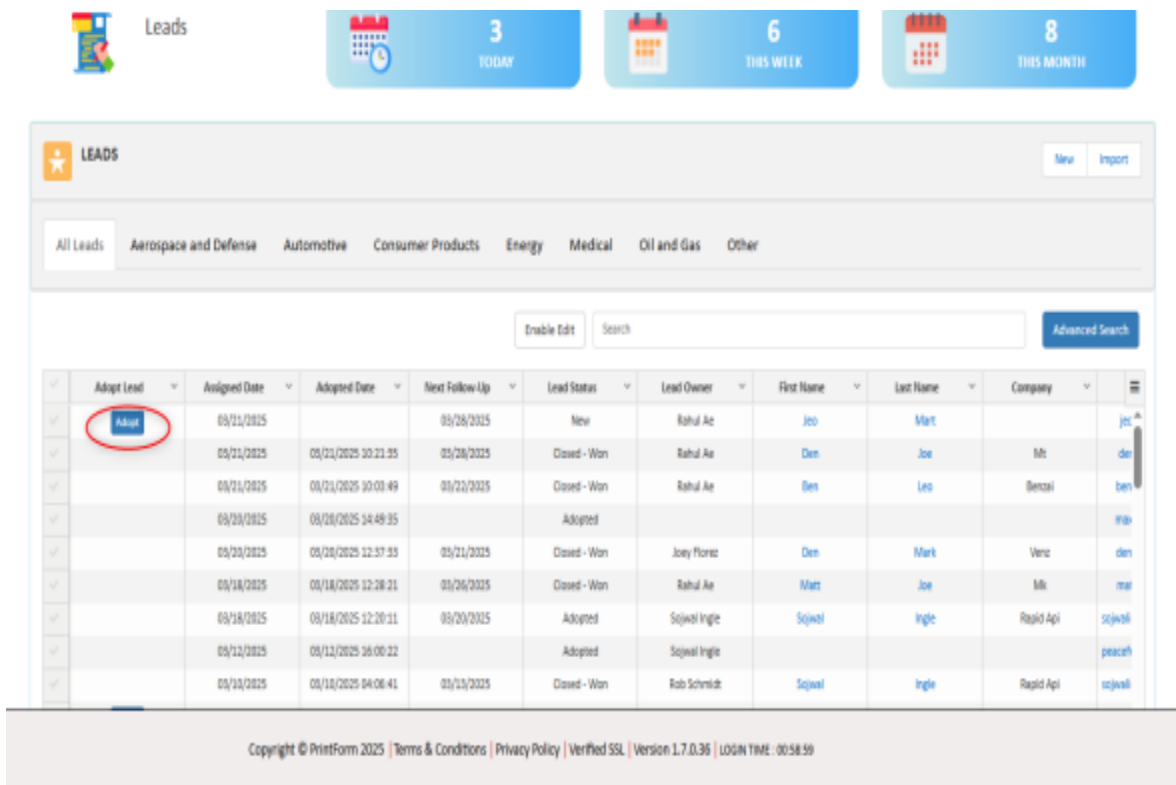
Adopt Lead	Assigned Date								
	03/21/2025								
	03/21/2025	03/21/2025 10:21:35	03/26/2025	Closed - Won	Rahul Ae	Den	Joe	Mt	der
	03/21/2025	03/21/2025 10:03:49	03/22/2025	Closed - Won	Rahul Ae	Ben	Leo	Benzai	ben
	03/20/2025	03/20/2025 14:49:35		Adopted					ma

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.



The screenshot displays the PRINTFORM LEADS dashboard. At the top, there are three summary cards: '3 TODAY', '6 THIS WEEK', and '8 THIS MONTH'. Below these is a 'LEADS' section with a 'New' and 'Import' button. A filter bar shows categories: 'All Leads', 'Aerospace and Defense', 'Automotive', 'Consumer Products', 'Energy', 'Medical', 'Oil and Gas', and 'Other'. A search bar with 'Enable Edit' and 'Advanced Search' buttons is present. The main table lists leads with columns: Adopt Lead, Assigned Date, Adopted Date, Next Follow Up, Lead Status, Lead Owner, First Name, Last Name, and Company. The first row shows a lead with status 'New' and owner 'Rahul Ae'. The 'Adopt' button in the first row is circled in red.

Adopt Lead	Assigned Date	Adopted Date	Next Follow Up	Lead Status	Lead Owner	First Name	Last Name	Company
Adopt	05/11/2025		05/26/2025	New	Rahul Ae	Joe	Mart	
	05/11/2025	05/11/2025 10:21:35	05/26/2025	Closed - Won	Rahul Ae	Den	Joe	Mt
	05/11/2025	05/11/2025 10:01:49	05/23/2025	Closed - Won	Rahul Ae	Ben	Leo	Benzai
	05/18/2025	05/18/2025 14:49:35		Adopted				
	05/20/2025	05/20/2025 12:37:33	05/21/2025	Closed - Won	Joey Flores	Den	Mark	Venc
	05/18/2025	05/18/2025 12:28:21	05/26/2025	Closed - Won	Rahul Ae	Matt	Joe	Mt
	05/18/2025	05/18/2025 12:20:11	05/20/2025	Adopted	Sejwal Ingle	Sejwal	Ingle	Rapid Api
	05/12/2025	05/12/2025 16:00:22		Adopted	Sejwal Ingle			
	05/18/2025	05/18/2025 04:08:41	05/19/2025	Closed - Won	Rob Schmidt	Sejwal	Ingle	Rapid Api

Copyright © PrintForm 2025 | Terms & Conditions | Privacy Policy | Verified SSL | Version 1.7.0.36 | LOGIN TIME: 00:58:59

3.1 View 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

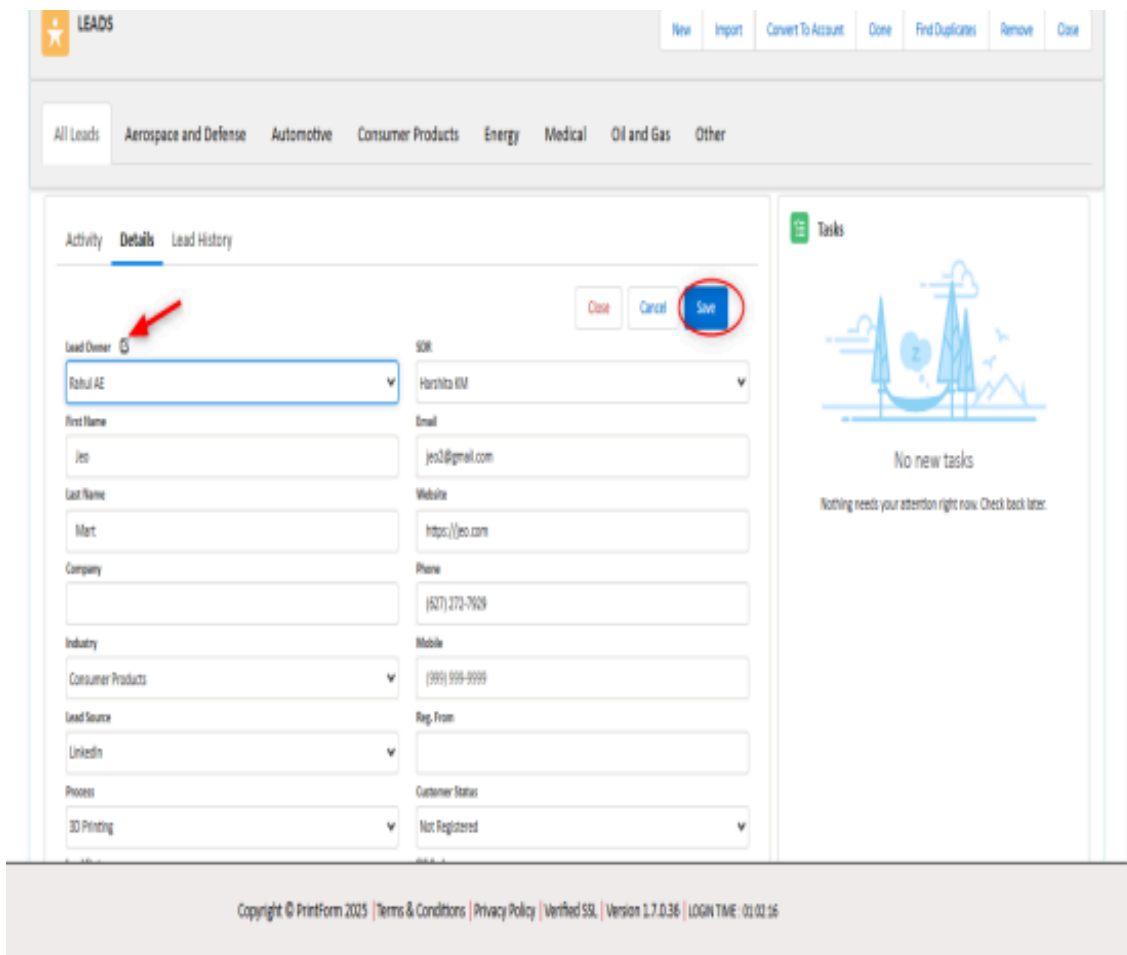
To duplicate a lead, click the ***Clone*** option in the header tabs. This is useful for creating similar leads without re-entering all details.

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***.



LEADS [New](#) [Import](#) [Convert To Account](#) [Done](#) [Find Duplicates](#) [Remove](#) [Close](#)

[All Leads](#) [Aerospace and Defense](#) [Automotive](#) [Consumer Products](#) [Energy](#) [Medical](#) [Oil and Gas](#) [Other](#)

Activity **Details** [Lead History](#)

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

Lead Owner: SO:

First Name: Email:

Last Name: Website:

Company: Phone:

Industry: Mobile:

Lead Source: Rep. From:

Process: Customer Status:

Tasks

No new tasks

Nothing needs your attention right now. Check back later.

Copyright © PrintForm 2025 | [Terms & Conditions](#) | [Privacy Policy](#) | [Verified SSL](#) | Version 1.7.0.36 | LOGIN TIME: 01.02.16

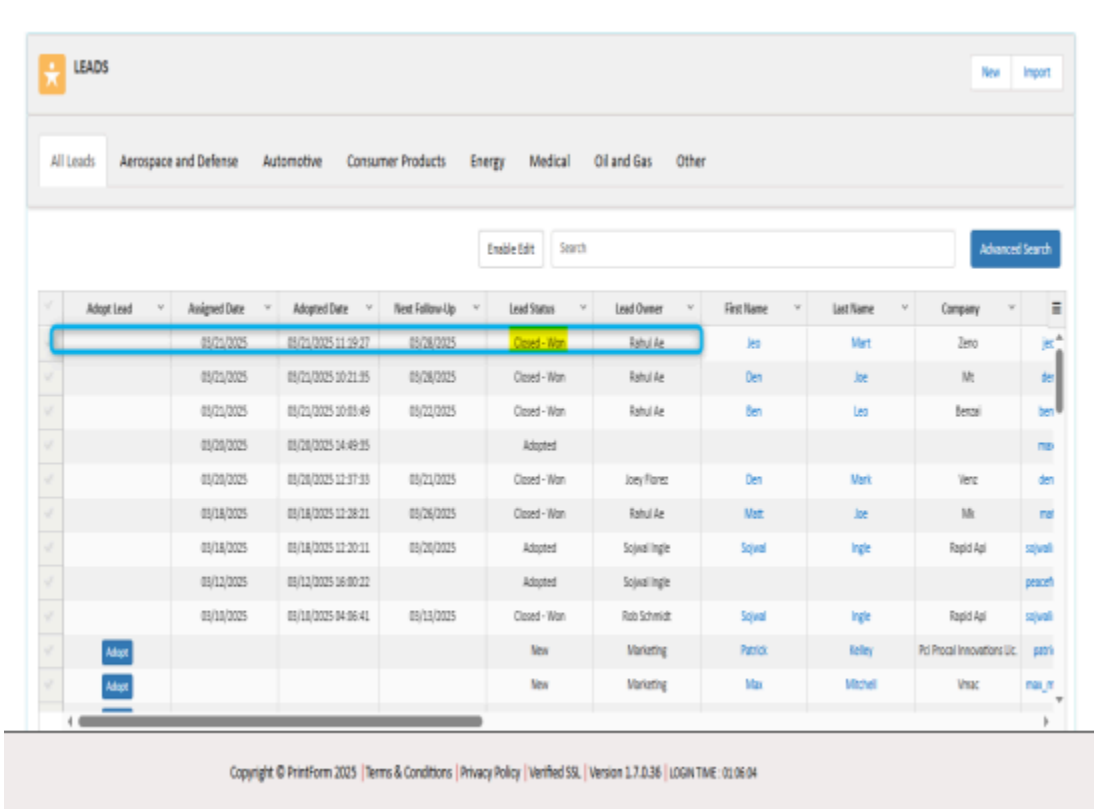
4. Converting a Lead to an Account

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

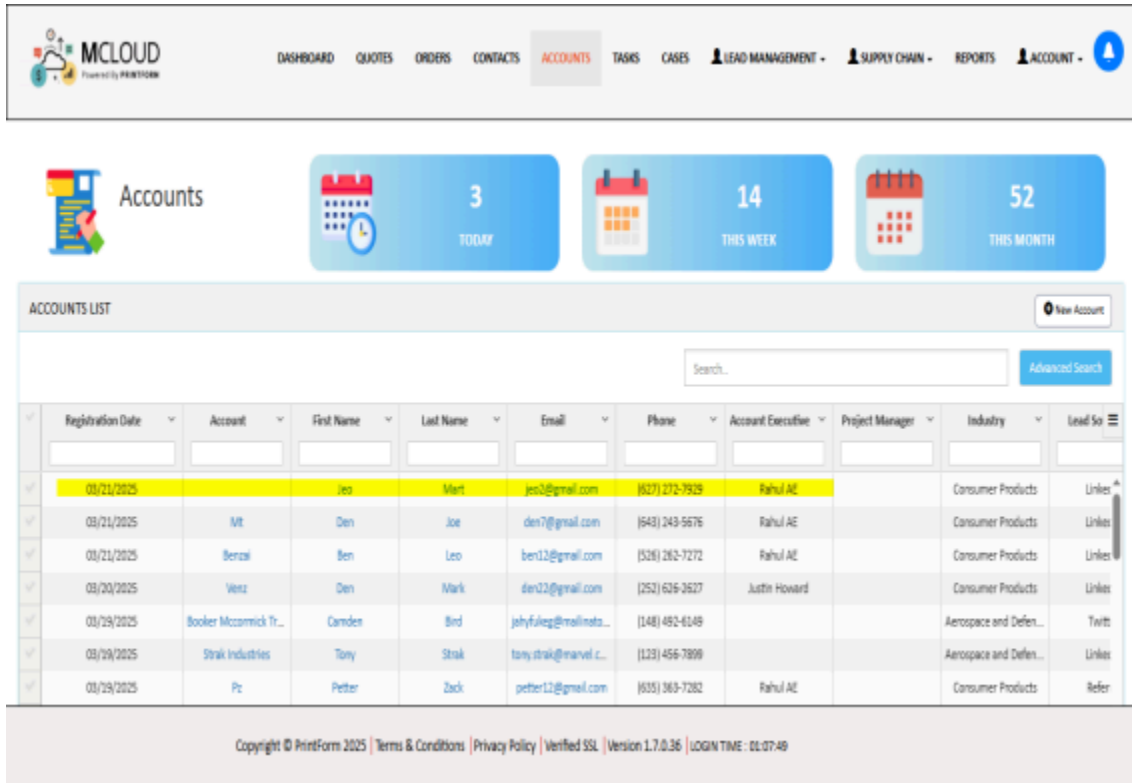
- The ***Assigned Date*** and ***Adopted Date*** will be automatically updated.
- The lead status will change to ***Closed-Won***, indicating that the lead has been successfully converted into an account.



Adopt Lead	Assigned Date	Adopted Date	Next Follow-Up	Lead Status	Lead Owner	First Name	Last Name	Company
<input checked="" type="checkbox"/>	03/21/2025	03/21/2025 11:29:27	03/28/2025	Closed - Won	Rahul Ae	Jes	Mart	Zeno
<input checked="" type="checkbox"/>	03/21/2025	03/21/2025 10:21:35	03/28/2025	Closed - Won	Rahul Ae	Den	Joe	Mt
<input checked="" type="checkbox"/>	03/21/2025	03/21/2025 10:03:49	03/21/2025	Closed - Won	Rahul Ae	Ben	Leo	Benzai
<input checked="" type="checkbox"/>	03/20/2025	03/20/2025 14:49:35		Adopted				
<input checked="" type="checkbox"/>	03/20/2025	03/20/2025 12:37:33	03/21/2025	Closed - Won	Joey Flores	Den	Mark	Venc
<input checked="" type="checkbox"/>	03/18/2025	03/18/2025 12:38:21	03/26/2025	Closed - Won	Rahul Ae	Matt	Joe	Mt
<input checked="" type="checkbox"/>	03/18/2025	03/18/2025 12:20:11	03/20/2025	Adopted	Sojwal Ingle	Sojwal	Ingle	Rapid Api
<input checked="" type="checkbox"/>	03/12/2025	03/12/2025 16:00:22		Adopted	Sojwal Ingle			
<input checked="" type="checkbox"/>	03/10/2025	03/10/2025 04:06:41	03/13/2025	Closed - Won	Rob Schmidt	Sojwal	Ingle	Rapid Api
<input checked="" type="checkbox"/>				New	Marketing	Patrick	Reiley	Pci Procal Innovations LLC
<input checked="" type="checkbox"/>				New	Marketing	Max	Mitchell	Vhac

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.



The screenshot shows the MCloud Accounts Page. At the top, there is a navigation bar with links: DASHBOARD, QUOTES, ORDERS, CONTACTS, ACCOUNTS (highlighted), TASKS, CASES, LEAD MANAGEMENT, SUPPLY CHAIN, REPORTS, and ACCOUNT. Below the navigation bar, there are three summary cards: 'Accounts' with a calendar icon, '3 TODAY', '14 THIS WEEK', and '52 THIS MONTH'. The main section is titled 'ACCOUNTS LIST' and features a search bar and a 'New Account' button. Below the search bar is a table with the following columns: Registration Date, Account, First Name, Last Name, Email, Phone, Account Executive, Project Manager, Industry, and Lead Source. The table contains 8 rows of data, with the first row highlighted in yellow.

Registration Date	Account	First Name	Last Name	Email	Phone	Account Executive	Project Manager	Industry	Lead Source
03/21/2025	MT	Den	Joe	den7@gmail.com	(643) 243-5676	Rahul AE		Consumer Products	Unl...
03/21/2025	Benzal	Ben	Leo	ben12@gmail.com	(528) 262-7272	Rahul AE		Consumer Products	Unl...
03/20/2025	Venz	Den	Mark	den22@gmail.com	(252) 626-2627	Justin Howard		Consumer Products	Unl...
03/19/2025	Booker McCormick Tr...	Camden	Bird	jehyfulog@mail.net	(148) 482-6148			Aerospace and Defen...	Twitt...
03/19/2025	Strak Industries	Tony	Strak	tonystrak@marvel.c...	(123) 456-7899			Aerospace and Defen...	Unl...
03/19/2025	Pz	Petter	Zack	petter12@gmail.com	(605) 369-7282	Rahul AE		Consumer Products	Refer...

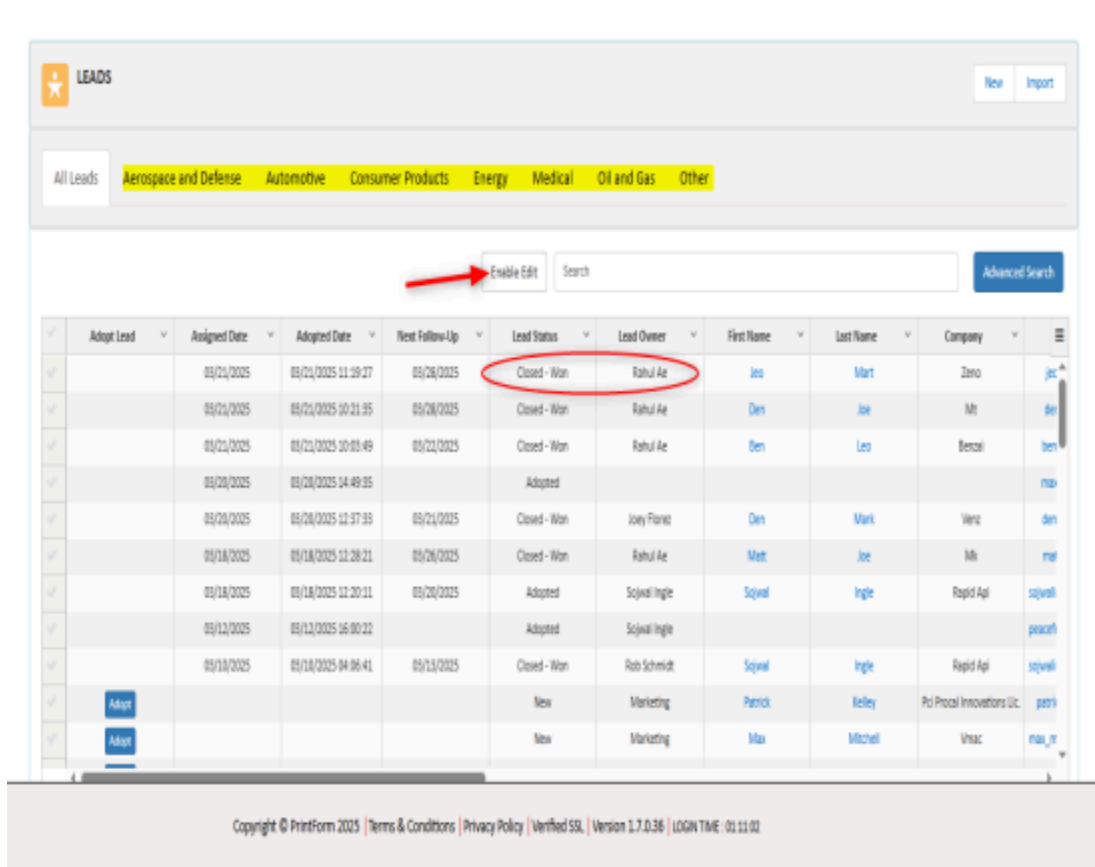
Copyright © PrintForm 2025 | Terms & Conditions | Privacy Policy | Verified SSL | Version 1.7.0.36 | LOGIN TIME : 01:07:49

-----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.



LEADS [New] [Import]

All Leads Aerospace and Defense Automotive Consumer Products Energy Medical Oil and Gas Other

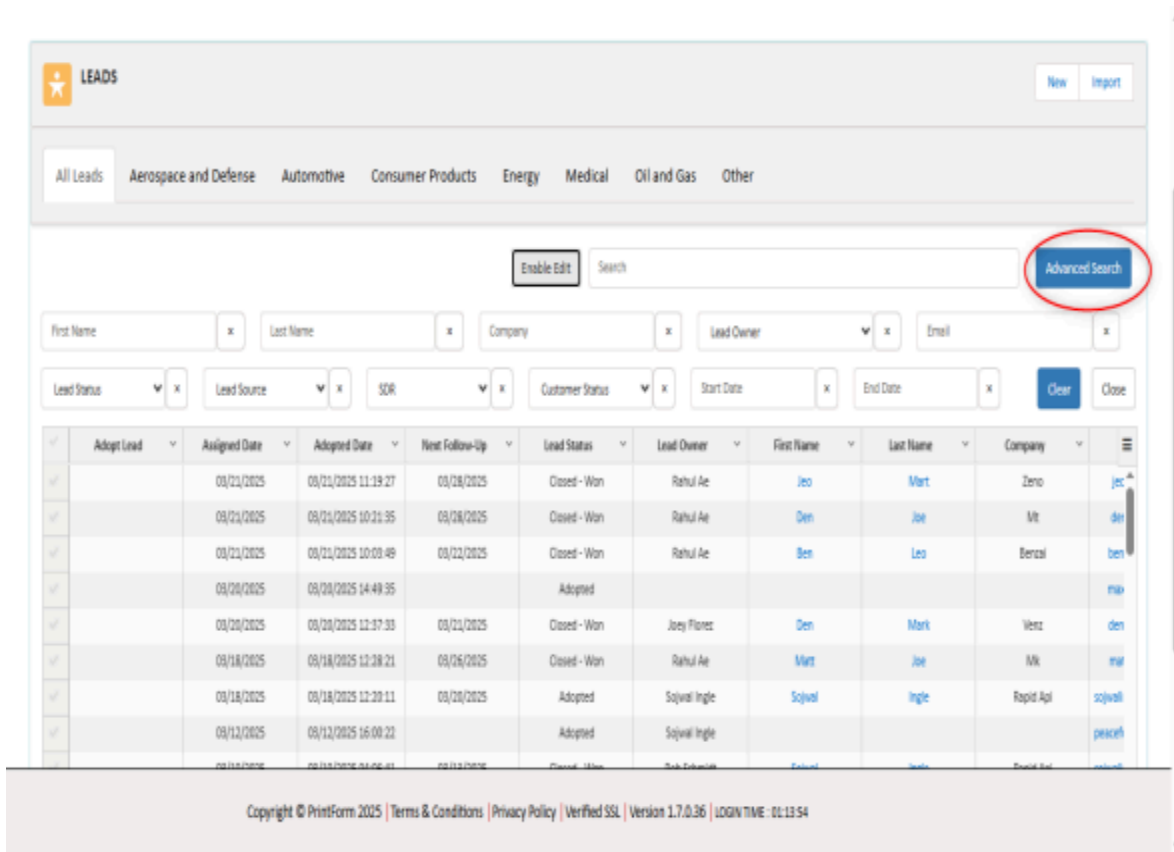
[Enable Edit] [Search] [Advanced Search]

Adopt Lead	Assigned Date	Adopted Date	Next Follow-Up	Lead Status	Lead Owner	First Name	Last Name	Company
✓	09/21/2025	09/21/2025 11:59:27	09/28/2025	Closed - Won	Rahul Ae	Joe	Mart	Zeno
✓	09/21/2025	09/21/2025 10:21:35	09/28/2025	Closed - Won	Rahul Ae	Den	Joe	Mt
✓	09/21/2025	09/21/2025 10:01:49	09/22/2025	Closed - Won	Rahul Ae	Ben	Leo	Benzal
✓	09/20/2025	09/20/2025 14:49:35		Adopted				
✓	09/20/2025	09/20/2025 12:37:33	09/21/2025	Closed - Won	Joey Flores	Den	Mark	Venz
✓	09/18/2025	09/18/2025 12:38:21	09/20/2025	Closed - Won	Rahul Ae	Matt	Joe	Mt
✓	09/18/2025	09/18/2025 12:30:11	09/20/2025	Adopted	Sqjwal Ingle	Sqjwal	Ingle	Rapid Api
✓	09/12/2025	09/12/2025 16:00:22		Adopted	Sqjwal Ingle			
✓	09/10/2025	09/10/2025 04:06:41	09/12/2025	Closed - Won	Rob Schmidt	Sqjwal	Ingle	Rapid Api
Adopt				New	Marketing	Patrick	Reiley	Pci Procal Innovations LLC
Adopt				New	Marketing	Iliax	Mitchell	Vnac

Copyright © PrintForm 2025 | Terms & Conditions | Privacy Policy | Verified SSL | Version 1.7.0.36 | LOGIN TIME: 01:11:02

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.



The screenshot displays the PRINTFORM LEADS interface. At the top, there's a 'LEADS' header with 'New' and 'Import' buttons. Below it, a navigation bar lists various industries: All Leads, Aerospace and Defense, Automotive, Consumer Products, Energy, Medical, Oil and Gas, and Other. A search bar with an 'Enable Edit' button and a search input field is present. The 'Advanced Search' button is highlighted with a red circle. Below the search bar, there are several filter fields: First Name, Last Name, Company, Lead Owner, Email, Lead Status, Lead Source, SQR, Customer Status, Start Date, and End Date. A 'Clear' button and a 'Close' button are also visible. The main table lists leads with columns for Adopt Lead, Assigned Date, Adopted Date, Next Follow-Up, Lead Status, Lead Owner, First Name, Last Name, and Company. The footer contains copyright information and login details.

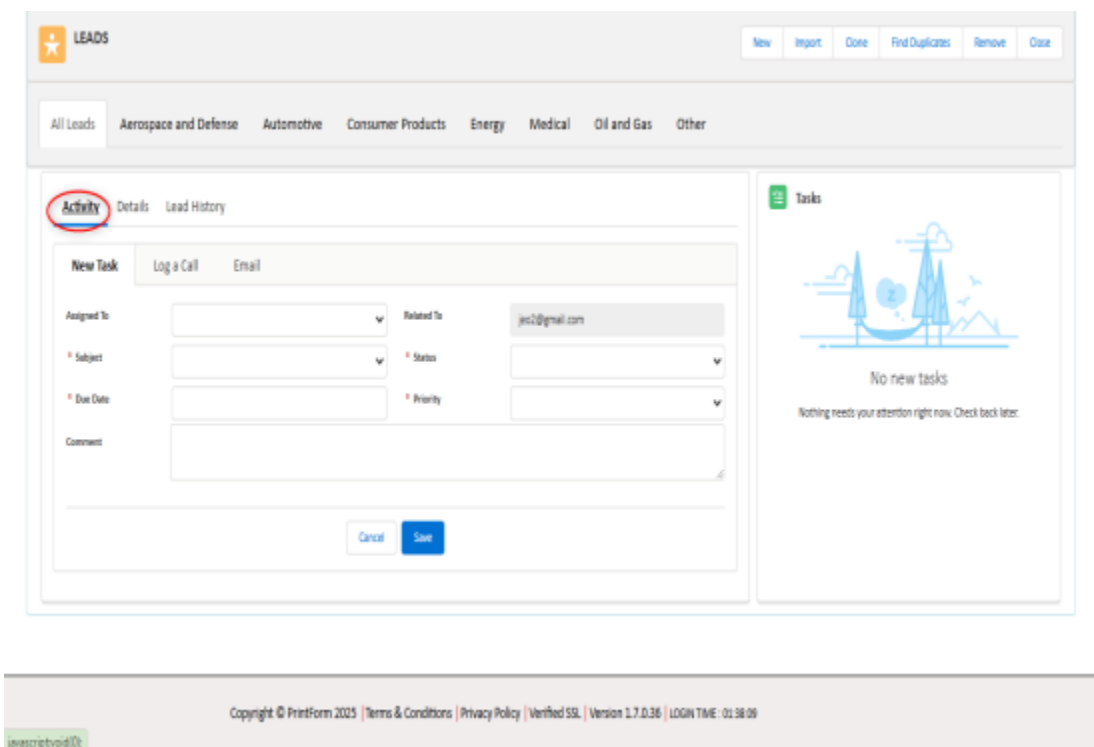
Adopt Lead	Assigned Date	Adopted Date	Next Follow-Up	Lead Status	Lead Owner	First Name	Last Name	Company
✓	03/21/2025	03/21/2025 11:19:27	03/28/2025	Closed - Won	Rahul Ae	Jeo	Mart	Zeno
✓	03/21/2025	03/21/2025 10:21:35	03/28/2025	Closed - Won	Rahul Ae	Den	Joe	Mt
✓	03/21/2025	03/21/2025 10:09:48	03/22/2025	Closed - Won	Rahul Ae	Ben	Leo	Benzal
✓	03/20/2025	03/20/2025 14:49:35		Adopted				
✓	03/20/2025	03/20/2025 12:37:33	03/21/2025	Closed - Won	Joey Flores	Den	Mark	Vertz
✓	03/18/2025	03/18/2025 12:18:21	03/26/2025	Closed - Won	Rahul Ae	Mart	Joe	Mt
✓	03/18/2025	03/18/2025 12:29:11	03/20/2025	Adopted	Sojwal Ingle	Sojwal	Ingle	Rapid Api
✓	03/12/2025	03/12/2025 16:00:22		Adopted	Sojwal Ingle			

Copyright © PrintForm 2025 | Terms & Conditions | Privacy Policy | Verified SSL | Version 1.7.0.36 | LOGIN TIME : 01:13:54

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.

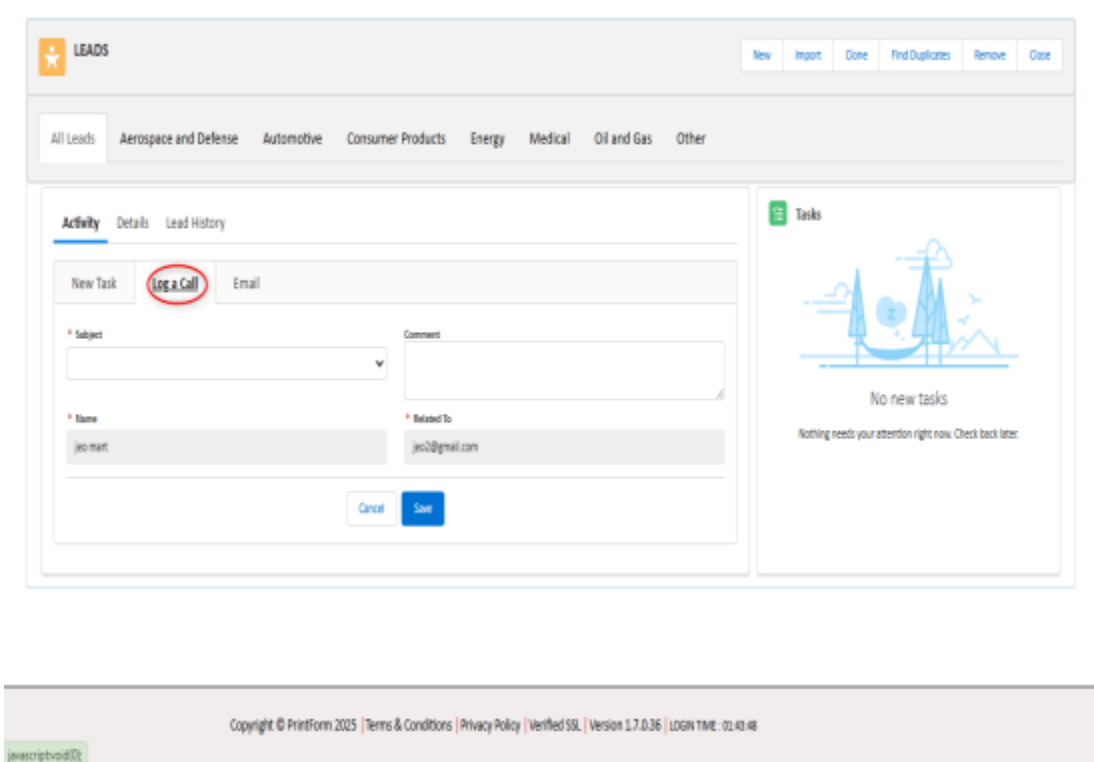


The screenshot displays the 'LEADS' management interface. At the top, there are tabs for 'All Leads', 'Aerospace and Defense', 'Automotive', 'Consumer Products', 'Energy', 'Medical', 'Oil and Gas', and 'Other'. Below these, the 'Activity' tab is selected and circled. The 'New Task' form is visible, with fields for 'Assigned To', 'Subject', 'Due Date', 'Related To', 'Status', 'Priority', and a 'Comment' box. The 'Related To' field is populated with 'jcs2@gmail.com'. A 'Save' button is located at the bottom right of the form. On the right side, a 'Tasks' sidebar shows 'No new tasks' with a message: 'Nothing needs your attention right now. Check back later.'

6.2 Call Information

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

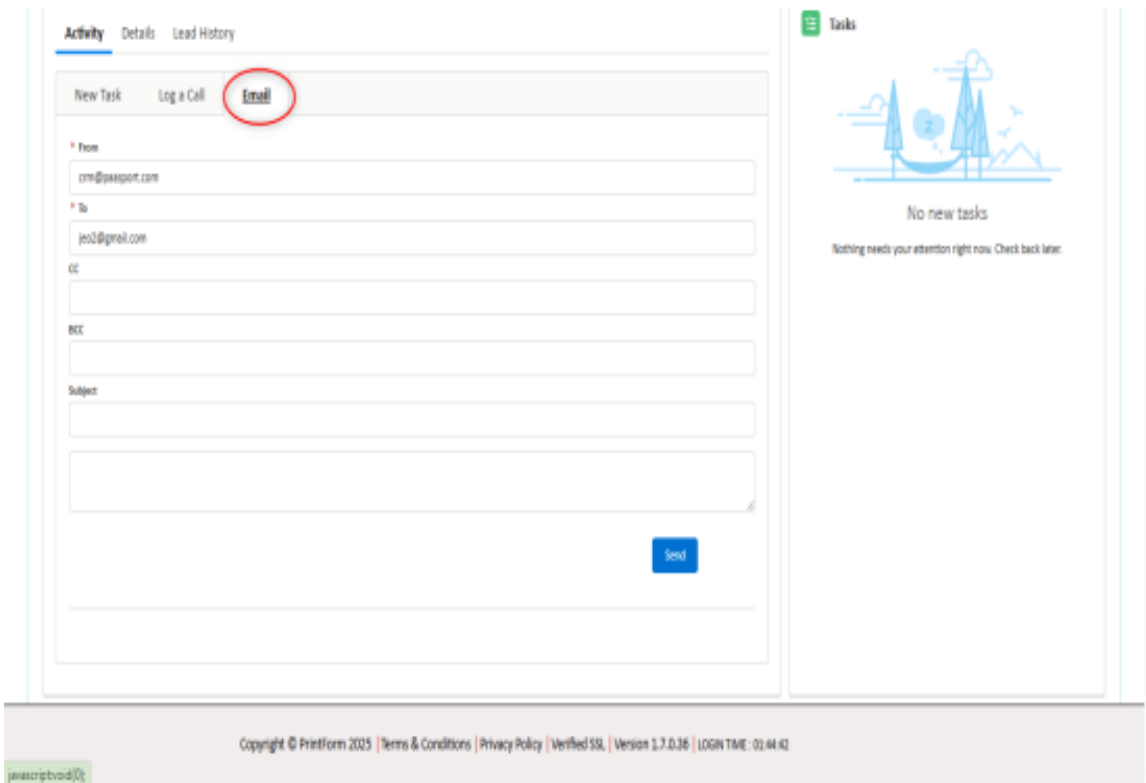
- Subject: Select a subject (Call, Email, Send Letter, Send Quote, Other).
- Comment: Add notes or descriptions about the call.
- Name: Display the lead's name.
- Related To: Link the call to the lead's email ID.



The screenshot displays the PRINTFORM LEADS interface. At the top, there's a 'LEADS' header with a star icon and a toolbar with buttons: New, Import, Clone, Find Duplicates, Remove, and Close. Below this is a navigation bar with tabs: All Leads, Aerospace and Defense, Automotive, Consumer Products, Energy, Medical, Oil and Gas, and Other. The main content area is divided into two sections. The left section, titled 'Activity', has sub-tabs: Details and Lead History. Under 'Details', there are three buttons: 'New Task', 'Log a Call' (which is circled in red), and 'Email'. Below these buttons are two input fields: 'Subject' (a dropdown menu) and 'Comment' (a text area). There are also two input fields for 'Name' and 'Related To', both containing the text 'jcs mart' and 'jcs2@gmail.com' respectively. At the bottom of this section are 'Cancel' and 'Save' buttons. The right section, titled 'Tasks', shows a message: 'No new tasks' and 'Nothing needs your attention right now. Check back later.' The footer of the page contains copyright information: 'Copyright © PrintForm 2025 | Terms & Conditions | Privacy Policy | Verified SSL | Version 1.7.0.36 | LOGIN TIME : 02:43:48'.

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.



Activity Details Lead History

New Task Log a Call **Email**

* From
crm@printform.com

* To
jeo2@gmail.com

CC

BCC

Subject

Send

Tasks

No new tasks

Nothing needs your attention right now. Check back later.

Copyright © PrintForm 2025 | Terms & Conditions | Privacy Policy | Verified SSL | Version 1.7.0.36 | LOGIN TIME: 01:44:42

javascript:void(0)

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.