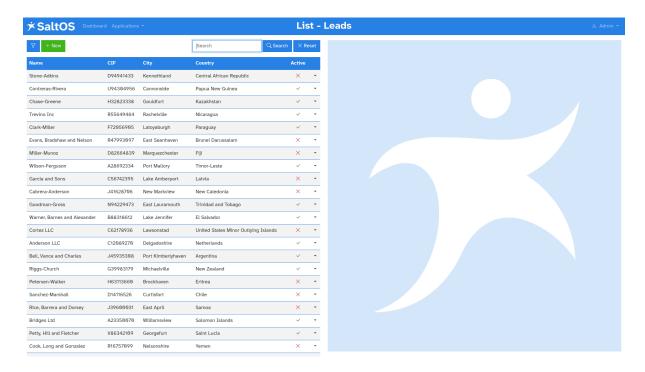# Leads

Description

The Leads application is used to register and track potential customers before they become actual clients. It allows you to collect key information about each lead, such as contact details, origin, and current status in the sales process. This module helps organize the pre-sales activity, enabling sales teams to follow up effectively, qualify opportunities, and convert leads into customers when appropriate.

List view

The following fields are displayed in the list view:

- Title: The title or subject of the meeting, summarizing its purpose.
- Location: The place where the meeting is held, or the online platform link if virtual.
- Start Time: Scheduled starting date and time of the meeting.
- Customer: Customer associated with the meeting, if applicable.

Form view

This view is used for creating, editing or viewing a lead.

In **create** mode, the form is empty and ready to enter new data.

New – Leads

Name	CIF	City	Country	Active
Stone-Adkins	D94941433	Kennethland	Central African Republic	✕
Contreras-Rivera	U94304956	Cannonside	Papua New Guinea	✓
Chase-Greene	H32823338	Gouldfurt	Kazakhstan	✓
Trevino Inc	R55649464	Rachelville	Nicaragua	✓
Clark-Miller	F72056905	Latoyaburgh	Paraguay	✓
Evans, Bradshaw and Nelson	R47993097	East Seanhaven	Brunei Darussalam	✕
Miller-Munoz	D82664839	Marquezchester	Fiji	✕
Wilson-Ferguson	A28692334	Port Mallory	Timor-Leste	✓
Garcia and Sons	C56742395	Lake Amberport	Latvia	✕
Cabrera-Anderson	J41628706	New Markview	New Caledonia	✕
Goodman-Gross	N94229473	East Lauramouth	Trinidad and Tobago	✓
Warner, Barnes and Alexander	B88318612	Lake Jennifer	El Salvador	✓
Cortez LLC	C62178936	Lawsonstad	United States Minor Outlying Islands	✕
Anderson LLC	C12089270	Delgadoshire	Netherlands	✓
Bell, Vance and Charles	J45935308	Port Kimberlyhaven	Argentina	✓
Riggs-Church	G39983179	Michaelville	New Zealand	✓
Petersen-Walker	H63113660	Brockhaven	Eritrea	✕
Sanchez-Marshall	D14116526	Curtisfort	Chile	✕
Rice, Barrera and Dorsey	J39600031	East April	Samoa	✕
Bridges Ltd	A23350070	Williamsview	Solomon Islands	✓
Petty, Hill and Fletcher	V86342109	Georgefurt	Saint Lucia	✓
Cook, Long and Gonzalez	R16757099	Nelsonshire	Yemen	✕

In **view** mode, the fields are filled with the selected record and cannot be edited.

Detail – Leads

Name	CIF	City	Country	Active
Stone-Adkins	D94941433	Kennethland	Central African Republic	✕
Contreras-Rivera	U94304956	Cannonside	Papua New Guinea	✓
Chase-Greene	H32823338	Gouldfurt	Kazakhstan	✓
Trevino Inc	R55649464	Rachelville	Nicaragua	✓
Clark-Miller	F72056905	Latoyaburgh	Paraguay	✓
Evans, Bradshaw and Nelson	R47993097	East Seanhaven	Brunei Darussalam	✕
Miller-Munoz	D82664839	Marquezchester	Fiji	✕
Wilson-Ferguson	A28692334	Port Mallory	Timor-Leste	✓
Garcia and Sons	C56742395	Lake Amberport	Latvia	✕
Cabrera-Anderson	J41628706	New Markview	New Caledonia	✕
Goodman-Gross	N94229473	East Lauramouth	Trinidad and Tobago	✓
Warner, Barnes and Alexander	B88318612	Lake Jennifer	El Salvador	✓
Cortez LLC	C62178936	Lawsonstad	United States Minor Outlying Islands	✕
Anderson LLC	C12089270	Delgadoshire	Netherlands	✓
Bell, Vance and Charles	J45935308	Port Kimberlyhaven	Argentina	✓
Riggs-Church	G39983179	Michaelville	New Zealand	✓
Petersen-Walker	H63113660	Brockhaven	Eritrea	✕
Sanchez-Marshall	D14116526	Curtisfort	Chile	✕
Rice, Barrera and Dorsey	J39600031	East April	Samoa	✕
Bridges Ltd	A23350070	Williamsview	Solomon Islands	✓
Petty, Hill and Fletcher	V86342109	Georgefurt	Saint Lucia	✓
Cook, Long and Gonzalez	R16757099	Nelsonshire	Yemen	✕

In **edit** mode, the form is pre-filled and allows modifications.

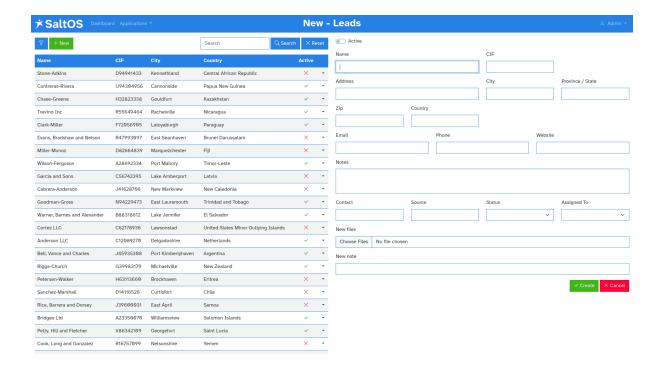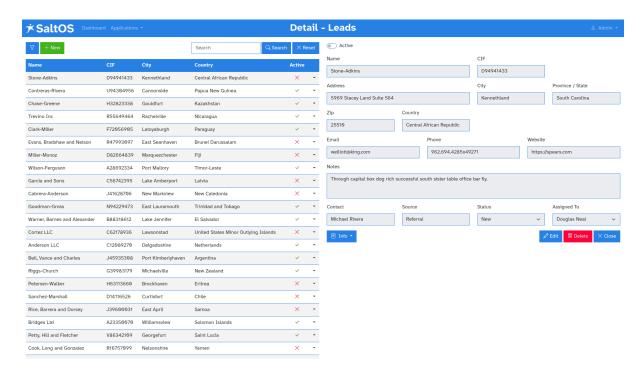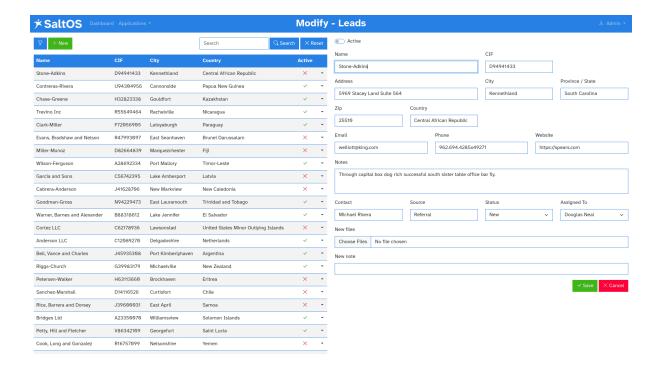The form includes the following fields:

- Title: The title or subject of the meeting, summarizing its purpose.

- Location: The place where the meeting is held, or the online platform link if virtual.

- Start Time: Scheduled starting date and time of the meeting.

- End Time: Planned ending date and time of the meeting.

- Related Customer: Customer associated with the meeting, if applicable.

- Participants: List of users or external contacts invited to the meeting.

- Agenda: The topics or plan intended to be covered during the meeting.

- Topics Approved: Items discussed in the meeting that were approved.

- Topics Rejected: Items discussed that were not approved or postponed.

- Topics Pending: Items discussed that require further action or decision.

Delete

Records can be deleted from the list view via the delete action. A confirmation prompt will appear before the operation is executed.

This action is irreversible and requires appropriate permissions.