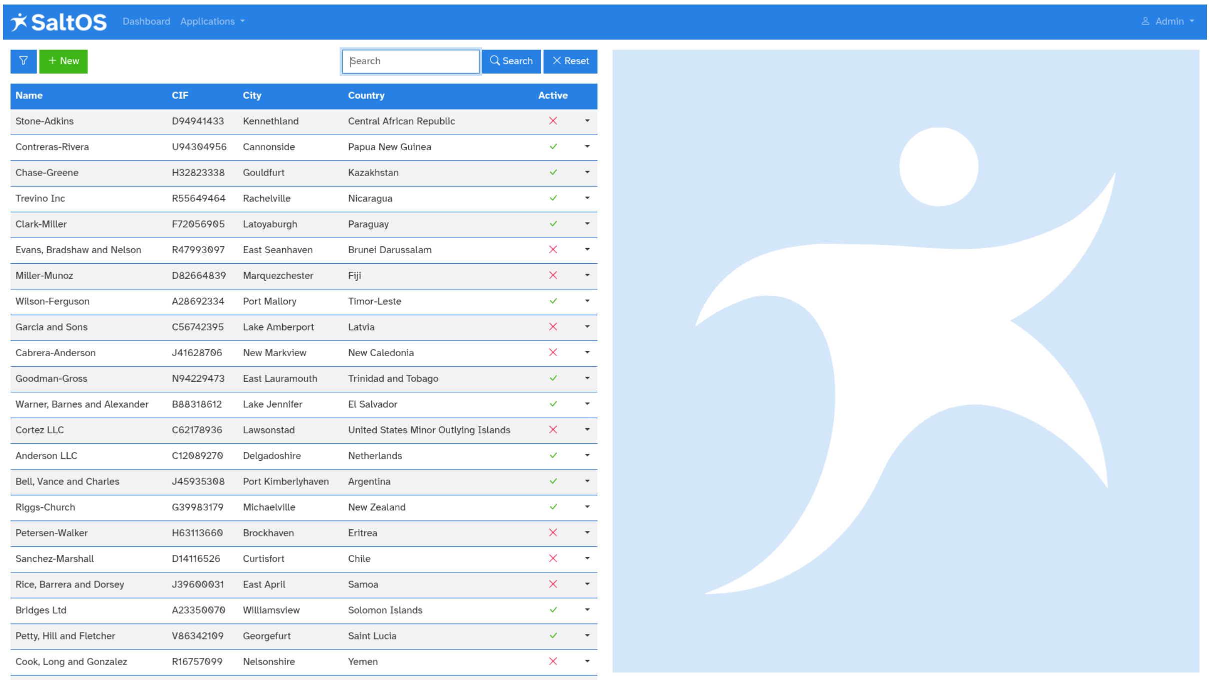
Leads

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



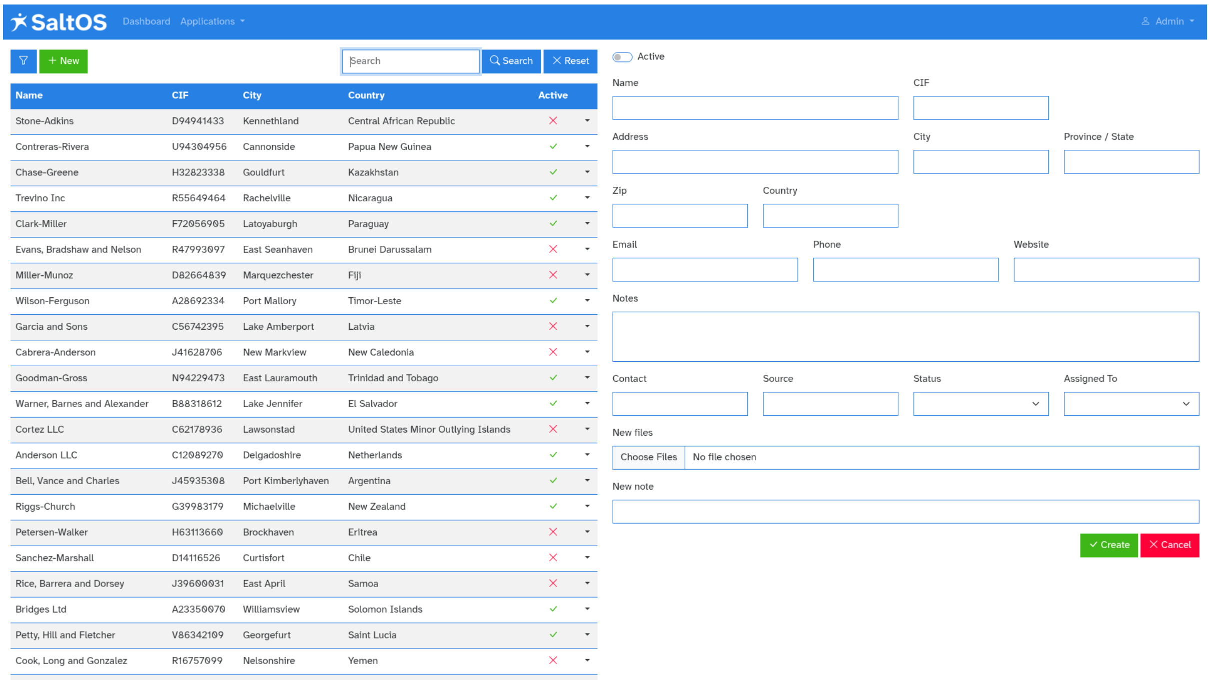
The following fields are displayed in the list view:

- Name: Full name or company name of the lead.
- Email: Main email address for contacting the lead.
- Phone: Primary contact phone number.
- Status: Current state of the lead (e.g., New, Contacted, Qualified).
- Type: Classification of the lead by business profile or interest.
- Assigned To: User responsible for following up the lead.
- Active: Indicates if the lead is currently active in the system.

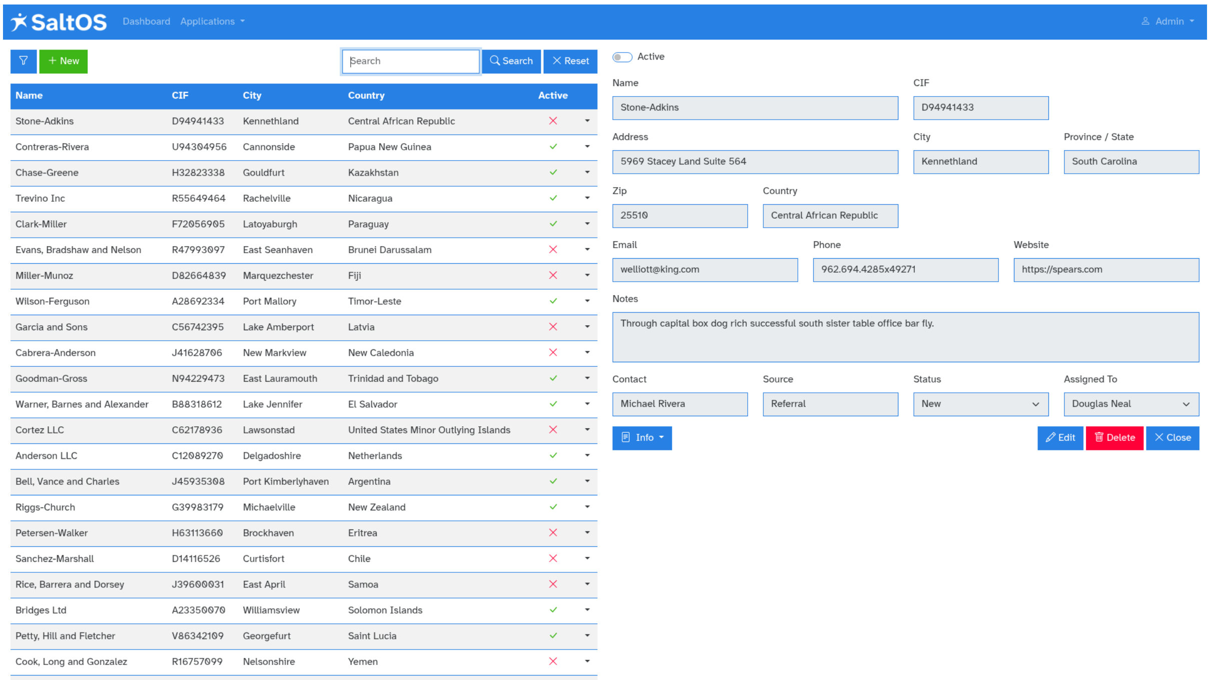
Form view

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

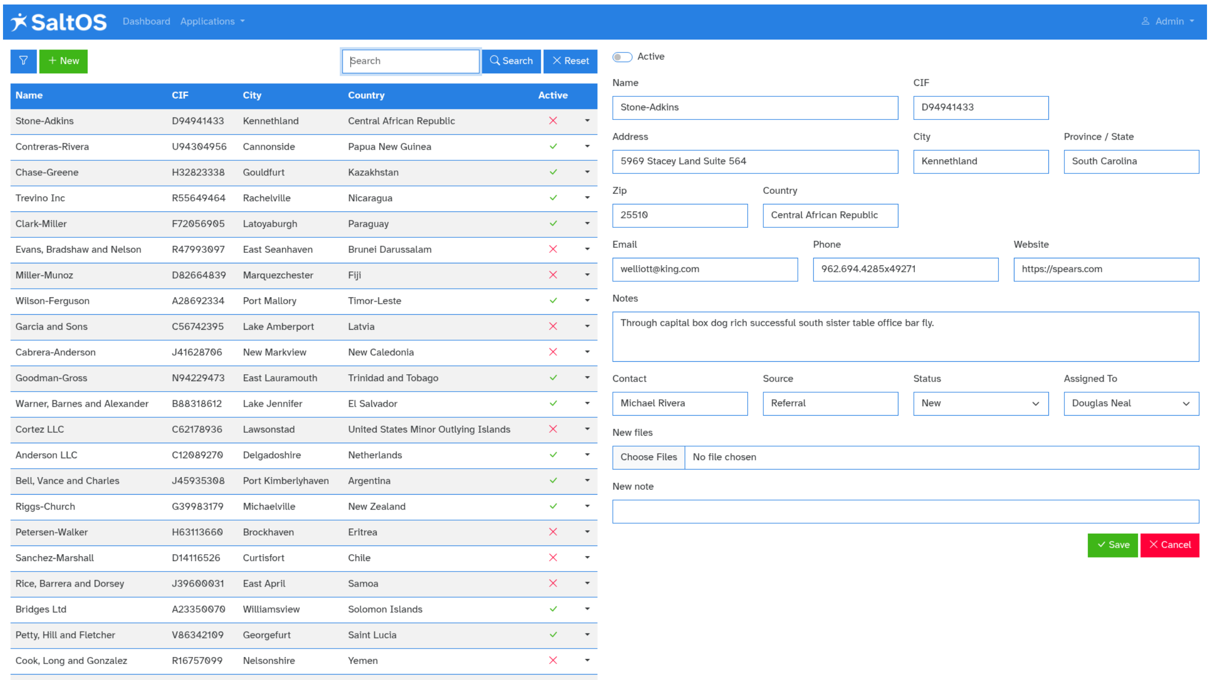
In **create** mode, the form is empty and ready to enter new data.



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



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



The form includes the following fields:

- Name: Full name or company name of the lead.
- Email: Main email address to contact the lead.
- Phone: Primary contact number.
- Status: Current state of the lead in the sales funnel.
- Type: Segment or classification of the lead.
- Assigned To: User responsible for managing this lead.
- Source: Origin of the lead (e.g., website, trade show, referral).
- Notes: Internal comments or observations about the lead.
- Active: Whether the lead is visible and in use.

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.