

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

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Name	CIF	City	Country	Active
Stone-Adkins	D94941433	Kennethland	Central African Republic	✗
Contreras-Rivera	U94364956	Cannonside	Papua New Guinea	✓
Chase-Greene	H32823338	Gouldfurt	Kazakhstan	✓
Trevino Inc	R55649464	Rachelville	Nicaragua	✓
Clark-Miller	F72656965	Latoyaburgh	Paraguay	✓
Evans, Bradshaw and Nelson	R47993097	East Seanhaven	Brunel Darussalam	✗
Miller-Munoz	D82664839	Marquezechester	Fiji	✗
Wilson-Ferguson	A28692334	Port Mallory	Timor-Leste	✓
Garcia and Sons	C56742395	Lake Amberport	Latvia	✗
Cabrera-Anderson	J41628766	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	C12689270	Deigadoshire	Netherlands	✓
Bell, Vance and Charles	J45935398	Port Kimberlyhaven	Argentina	✓
Riggs-Church	G39983179	Michaelville	New Zealand	✓
Petersen-Walker	H63113660	Brockhaven	Eritrea	✗
Sanchez-Marshall	D14116526	Curtisfort	Chile	✗
Rice, Barrera and Dorsey	J39660031	East April	Samoa	✗
Bridges Ltd	A23350070	Williamsview	Solomon Islands	✓
Petty, Hill and Fletcher	V86342109	Georgefurt	Saint Lucia	✓
Cook, Long and Gonzalez	R16757099	Nelsonshire	Yemen	✗

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.

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Active

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	Marquezechester	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	Deigadoshire	Netherlands	✓
Beil, 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	✗

Name

Stone-Adkins

CIF

D94941433

Address

5969 Stacey Land Suite 564

City

Kennethland

Province / State

South Carolina

Zip

25510

Country

Central African Republic

Email

welliot@king.com

Phone

962.694.4285x49271

Website

https://spears.com

Notes

Through capital box dog rich successful south sister table office bar fly.

Contact

Michael Rivera

Source

Referral

Status

New

Assigned To

Douglas Neal

New files

Choose Files No file chosen

New note

Save

Cancel

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.