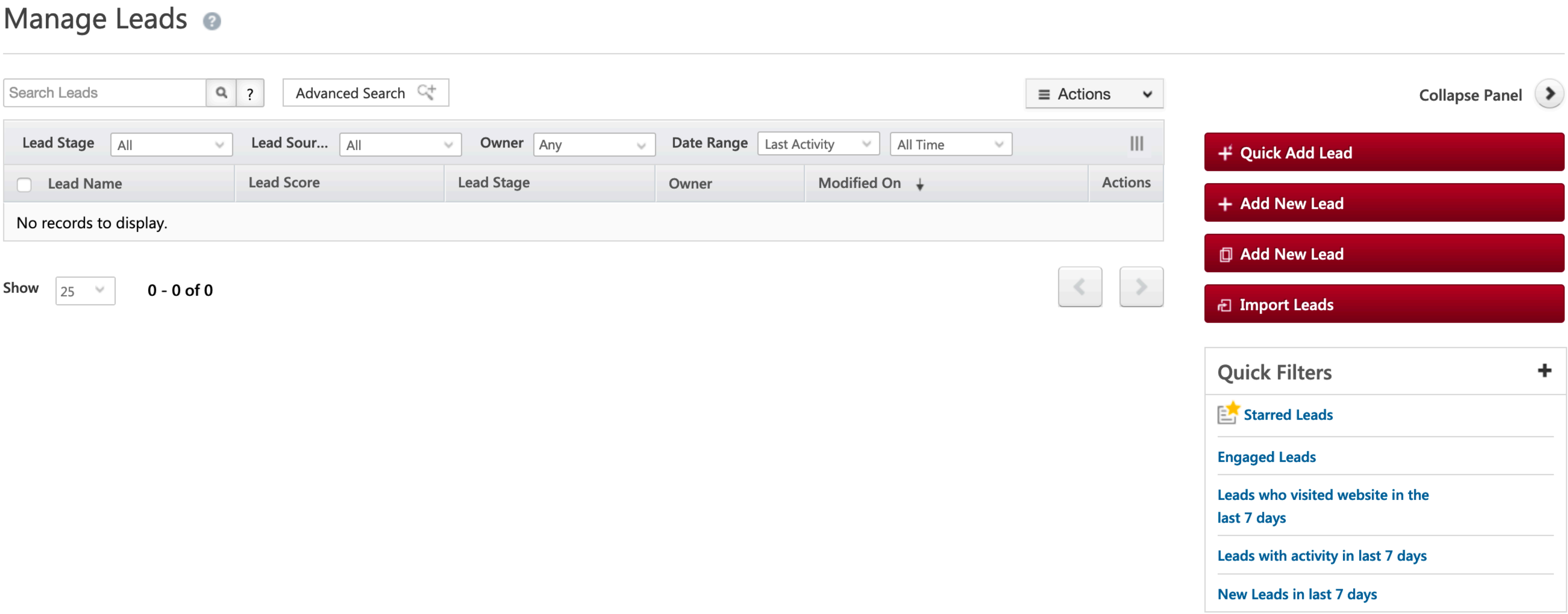
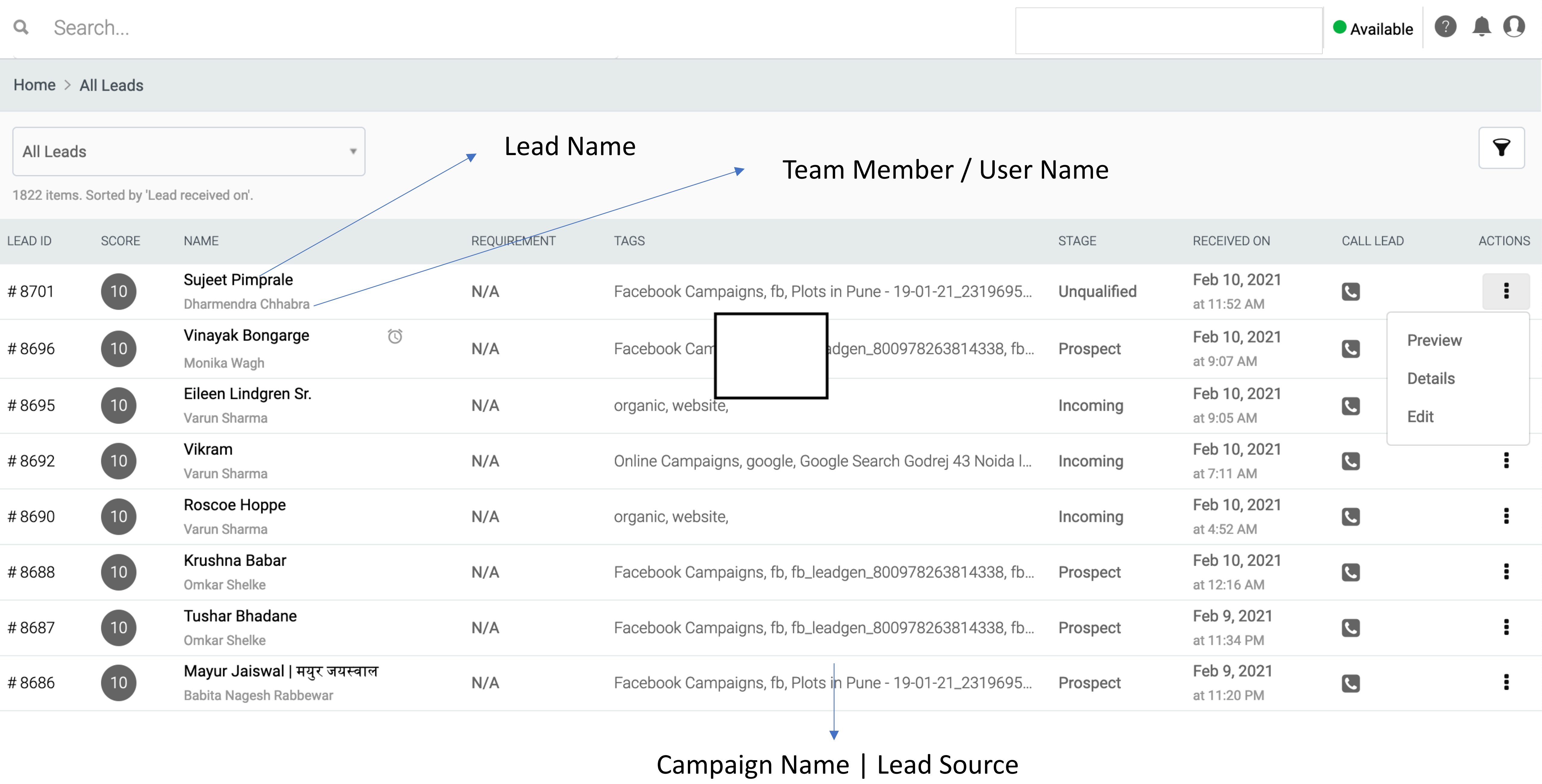
Forms & Dashboards

Manage Leads – Dashboard – List of leads with sorting option
Lead Detail View Page
Lead Activity Form
Lead Activities - Custom Option Required – Forms
New Lead Quick – Form (Custom Fields Required)
New Lead Details – Form (Custom Fields Required)
Lead Requirement – Forms (Custom Fields Required)
Lead Activity Dashboard
Followup Form
Followup Dashboard
Site Visit Form
Site Visit Dashboard
Task Form
Task Dashboard
To-do Form
To do Dashboard

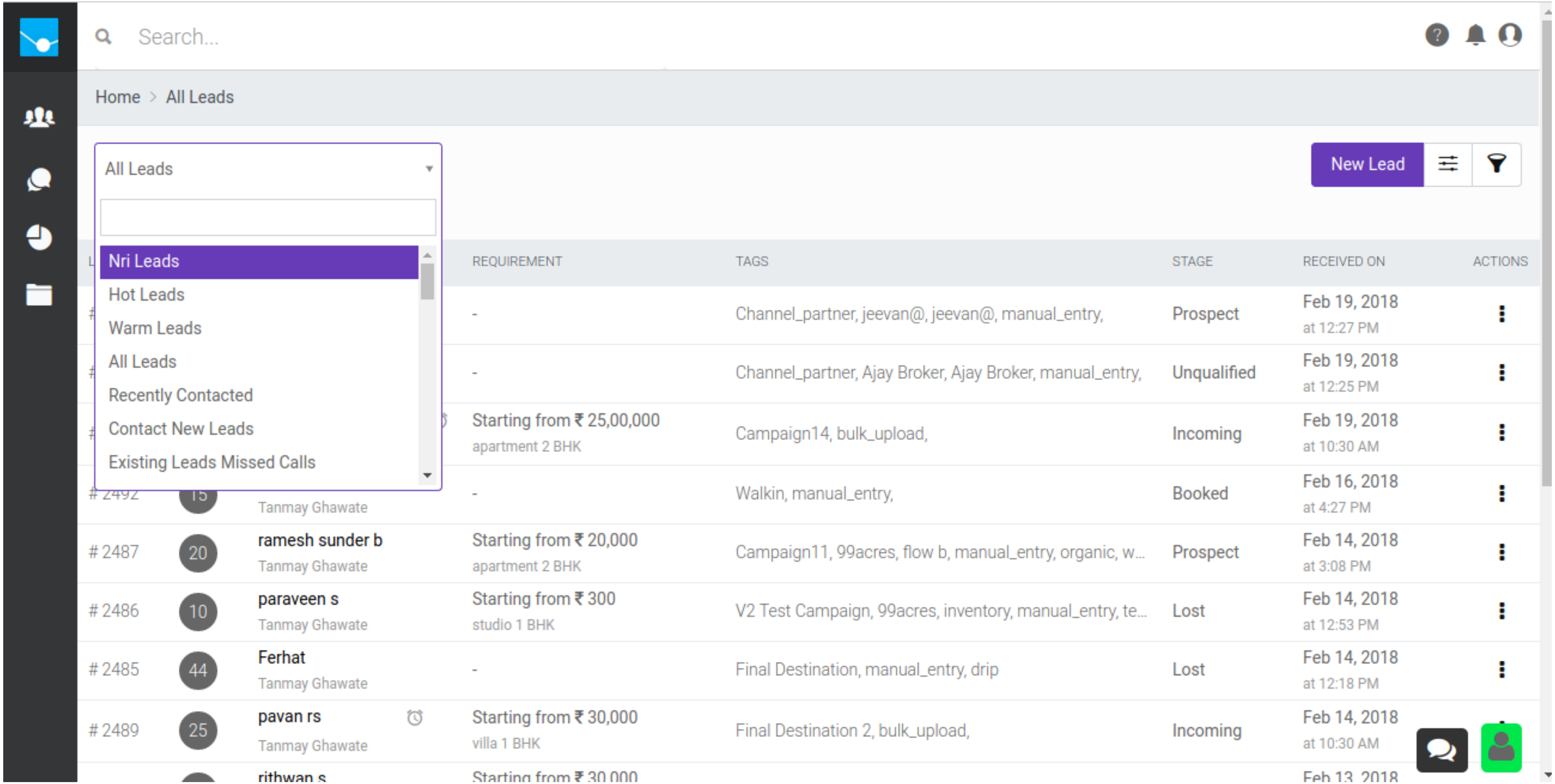
Master Forms

Lead Bucket – Custom Option Required – Master Form
Lead Sources. - Custom Option Required – Master Form
Lead Status - Custom Option Required – Master Form
Lead Stage - Custom Option Required – Master Form

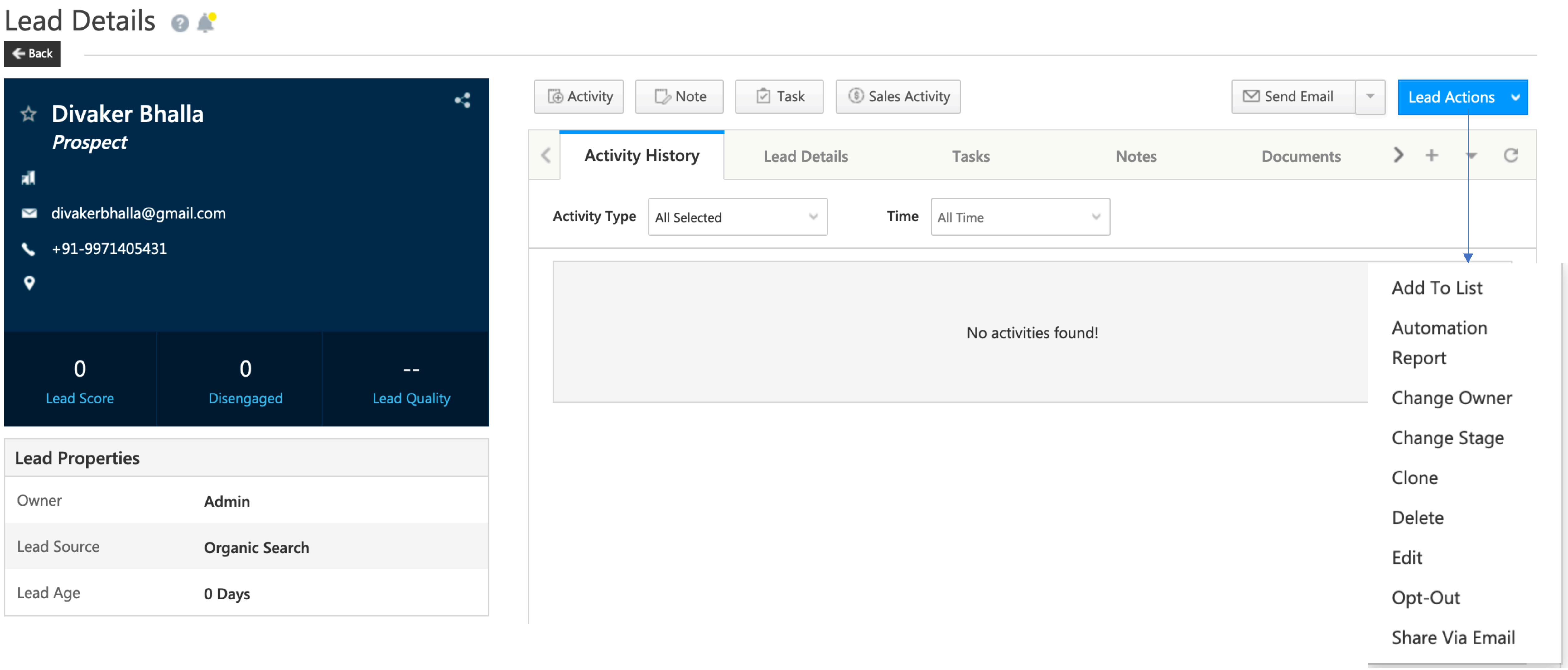

Manage Leads
Search Leads
?
Advanced Search
Actions
Collapse Panel
Lead Stage
All
Lead Sour...
All
Owner
Any
Date Range
Last Activity
All Time
Lead Name
Lead Score
Lead Stage
Owner
Modified On
Actions
No records to display.
Show
25
0 - 0 of 0
Quick Add Lead
Add New Lead
Add New Lead
Import Leads
Quick Filters
Starred Leads
Engaged Leads
Leads who visited website in the last 7 days
Leads with activity in last 7 days
New Leads in last 7 days


Search...
Available
Home > All Leads
All Leads
1822 items. Sorted by 'Lead received on'.
Lead Name
Team Member / User Name
LEAD ID
SCORE
NAME
REQUIREMENT
TAGS
STAGE
RECEIVED ON
CALL LEAD
ACTIONS
8701 | 10 | Sujeet Pimprale | Dharmendra Chhabra | N/A | Facebook Campaigns, fb, Plots in Pune - 19-01-21_2319695... | Unqualified | Feb 10, 2021 at 11:52 AM
8696 | 10 | Vinayak Bongarge | Monika Wagh | N/A | Facebook Cam adgen_800978263814338, fb... | Prospect | Feb 10, 2021 at 9:07 AM
8695 | 10 | Eileen Lindgren Sr. | Varun Sharma | N/A | organic, website, | Incoming | Feb 10, 2021 at 9:05 AM
8692 | 10 | Vikram | Varun Sharma | N/A | Online Campaigns, google, Google Search Godrej 43 Noida l... | Incoming | Feb 10, 2021 at 7:11 AM
8690 | 10 | Roscoe Hoppe | Varun Sharma | N/A | organic, website, | Incoming | Feb 10, 2021 at 4:52 AM
8688 | 10 | Krushna Babar | Omkar Shelke | N/A | Facebook Campaigns, fb, fb_leadgen_800978263814338, fb... | Prospect | Feb 10, 2021 at 12:16 AM
8687 | 10 | Tushar Bhadane | Omkar Shelke | N/A | Facebook Campaigns, fb, fb_leadgen_800978263814338, fb... | Prospect | Feb 9, 2021 at 11:34 PM
8686 | 10 | Mayur Jaiswal | मयुर जयस्वाल | Babita Nagesh Rabbewar | N/A | Facebook Campaigns, fb, Plots in Pune - 19-01-21_2319695... | Prospect | Feb 9, 2021 at 11:20 PM
Preview
Details
Edit
Campaign Name | Lead Source

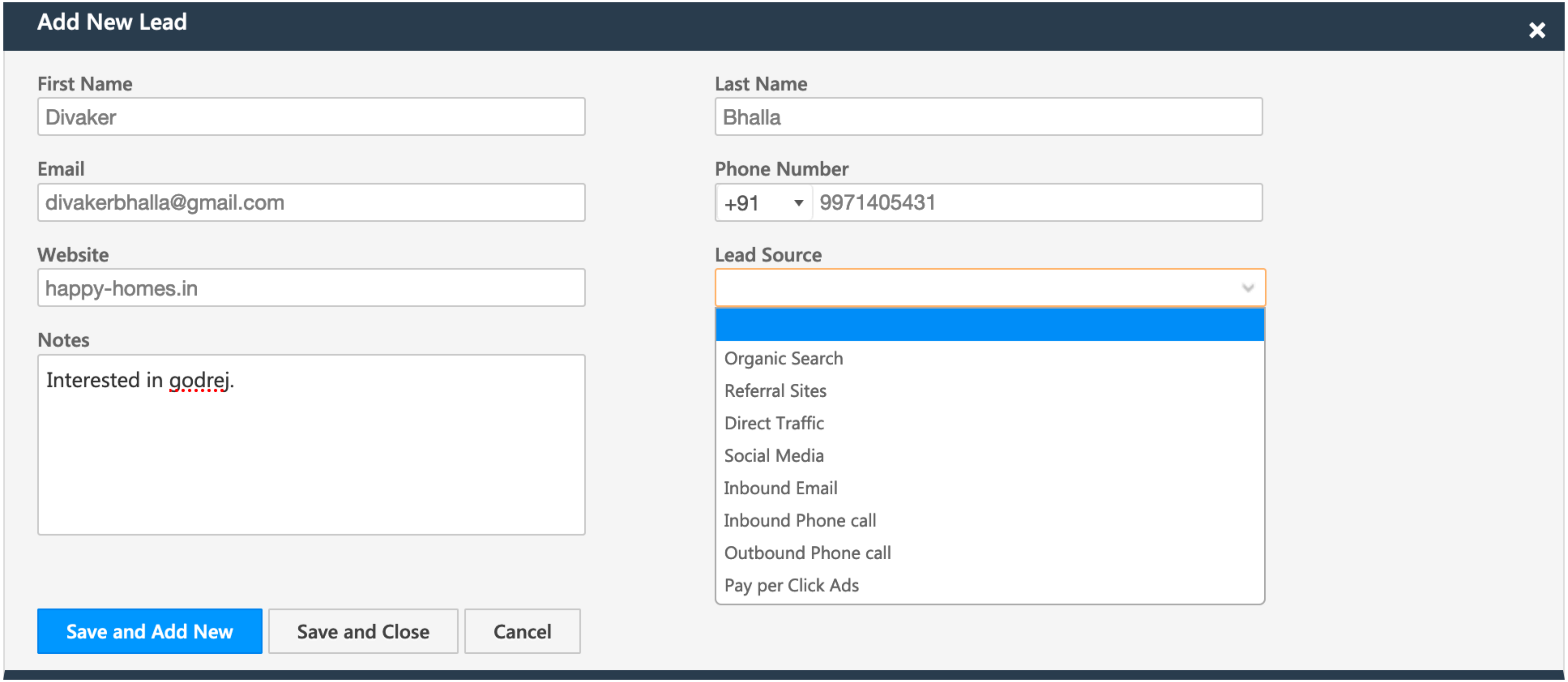
Leads Sorting View | Options



Single Dealer Lead Request



Add New Lead – Quick Form



Add New Lead – Detail Form

Add New Lead

Lead details | Additional Details

First Name

Last Name

Email

Phone Number

Company

Website

Do Not SMS

Do Not Track

Do Not Email

Do Not Call

Lead Source

Source Campaign

Mobile Number

Source Medium

Source Content

Job Title

Notes

Lead Stage *

Prospect

Owner *

Admin

Address 1

Address 2

City

State

Country

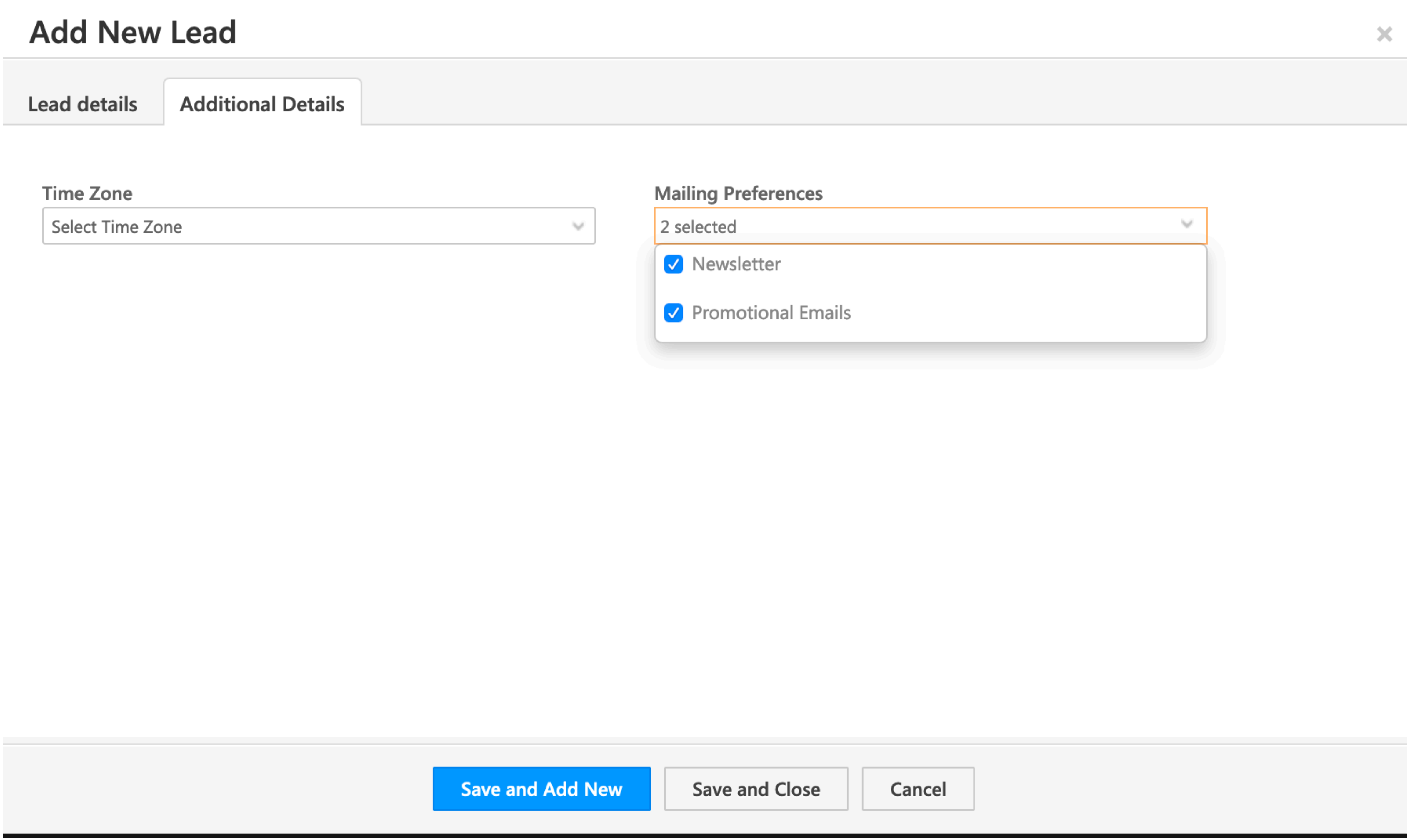
Zip

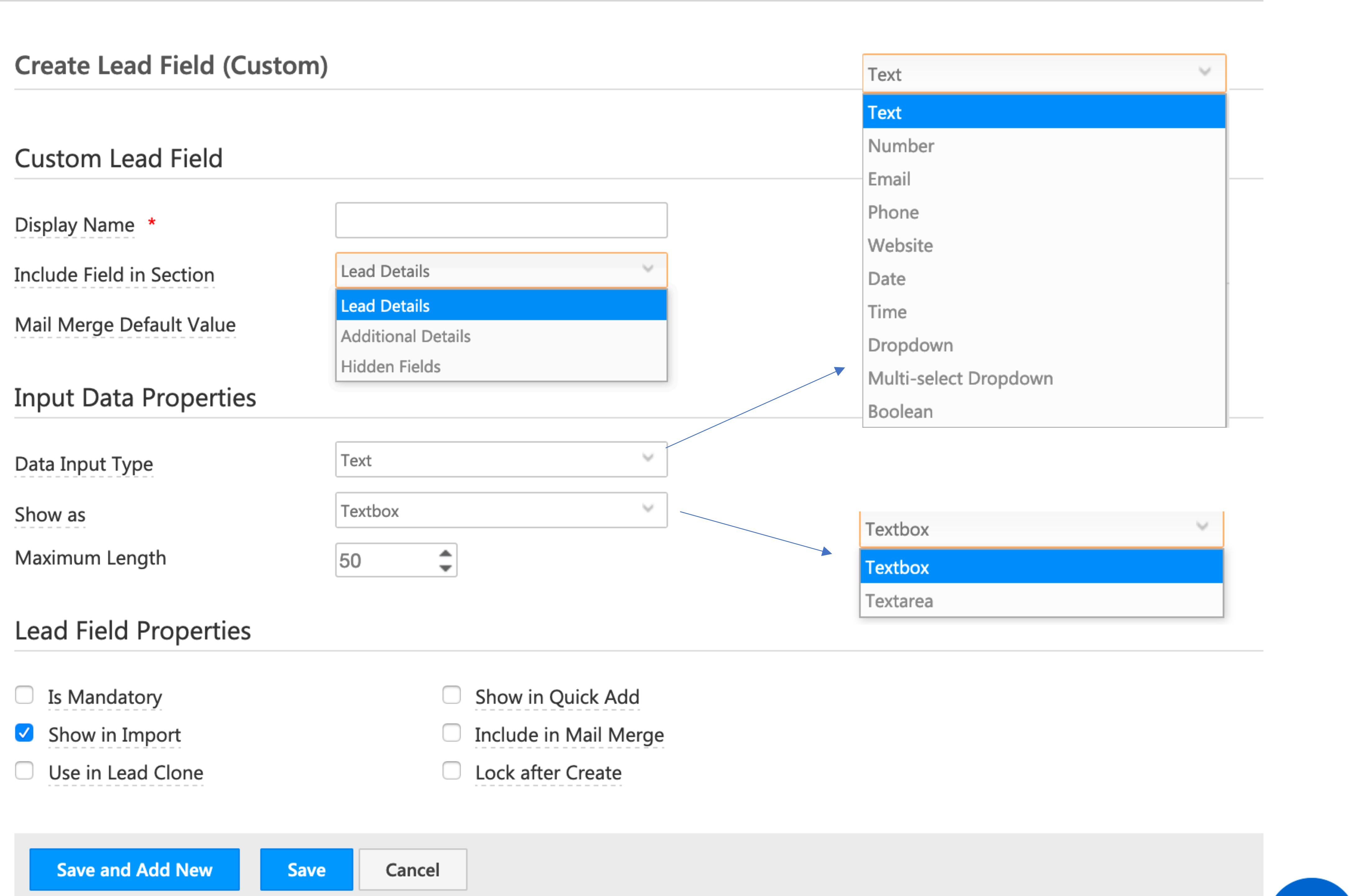
Lead Origin

Save and Add New

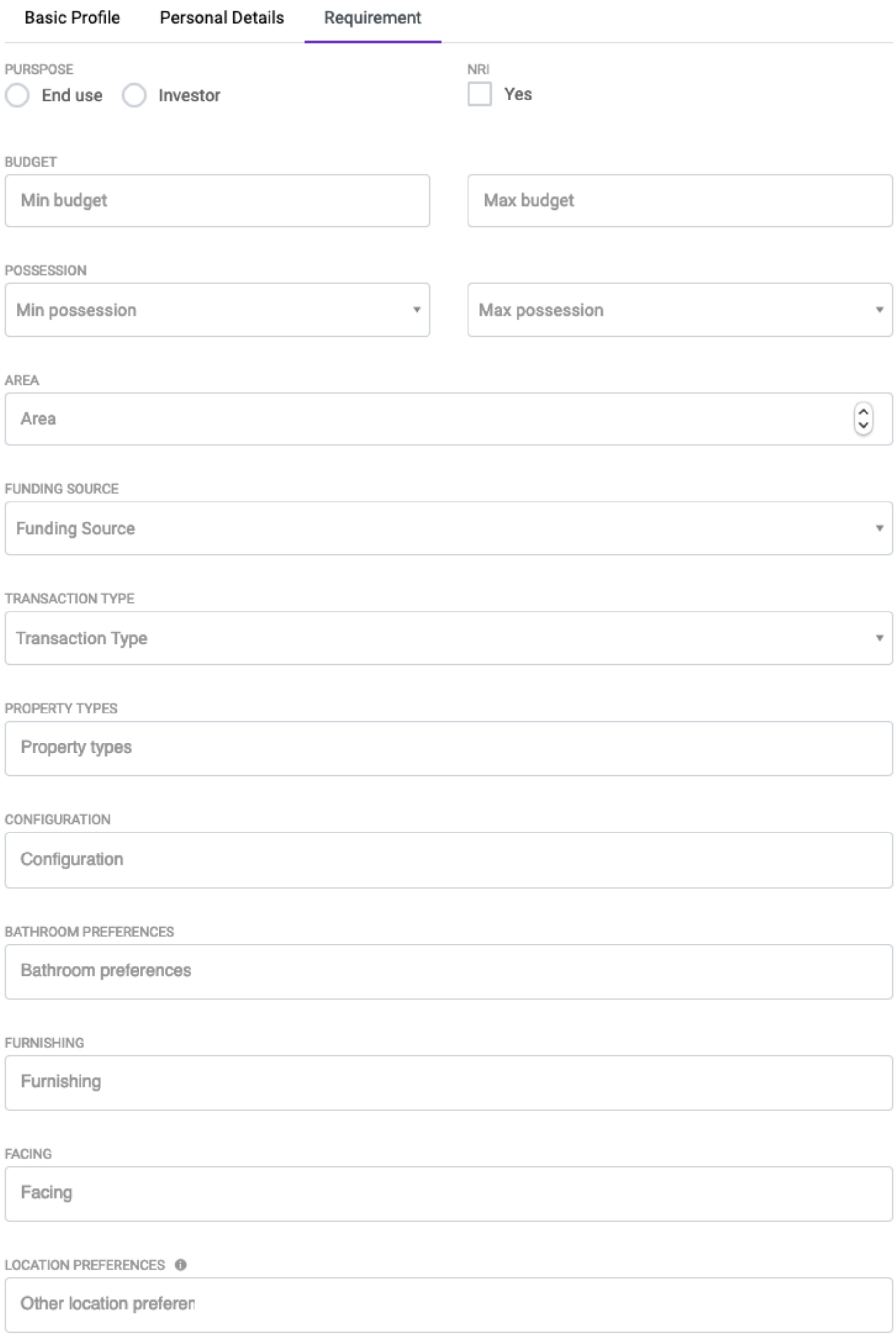
Save and Close

Cancel


Add New Lead
Lead details
Additional Details
Time Zone
Select Time Zone
Mailing Preferences
2 selected
Newsletter
Promotional Emails
Save and Add New
Save and Close
Cancel


Create Lead Field (Custom)
Custom Lead Field
Display Name *
Include Field in Section
Lead Details
Lead Details
Additional Details
Hidden Fields
Mail Merge Default Value
Input Data Properties
Data Input Type
Text
Show as
Textbox
Maximum Length
50
Text
Text
Number
Email
Phone
Website
Date
Time
Dropdown
Multi-select Dropdown
Boolean
Textbox
Textbox
Textarea
Lead Field Properties
Is Mandatory
Show in Quick Add
Show in Import
Include in Mail Merge
Use in Lead Clone
Lock after Create
Save and Add New
Save
Cancel

Requirements


Basic Profile | Personal Details | Requirement

PURSPOSE
End use | Investor

NRI
Yes

BUDGET
Min budget | Max budget

POSSESSION
Min possession | Max possession

AREA
Area

FUNDING SOURCE
Funding Source

TRANSACTION TYPE
Transaction Type

PROPERTY TYPES
Property types

CONFIGURATION
Configuration

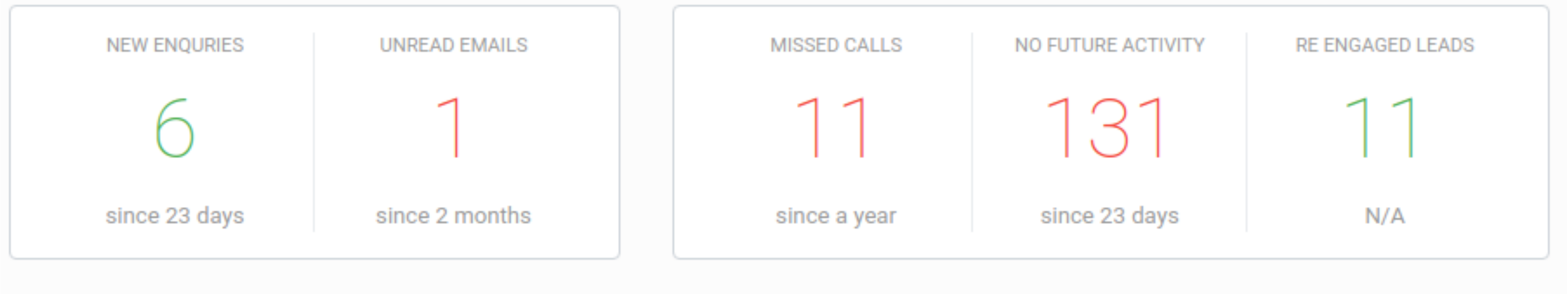
BATHROOM PREFERENCES
Bathroom preferences

FURNISHING
Furnishing

FACING
Facing

LOCATION PREFERENCES
Other location preferen

Lead Bucket – Options



1) <u>New Enquiries</u>

This bucket shows the total number of incoming enquiries received through any medium (i.e. virtual number, enquiry form on the website or through property portals) for which communication has not been established yet. The untouched leads are not included in this bucket.

Untouched Leads: The inquiries for which the Sales person has tried to communicate with the customer but communication could not be established yet (call not answered) due to customer unavailability.

Touched Leads: Inquiries for which communication has been established (call answered) between the sales and customer.

Click the **New Enquiries** Count bucket, to view the list of these new inquiries.

2) <u>Unread emails</u> All the emails from the leads that have not been opened by the particular sales or pre-sales will reflect under this bucket.

3) <u>Missed calls</u> All the leads for which the calls have been missed; i.e. the lead tried calling but the call was not answered by the sales or pre-sales will reflect under this bucket.

- **4) <u>No future activity</u>**
-
- The leads on which no activity has been scheduled (i.e. site visit or follow-up) will reflect under this bucket. The connection has been established (atleast one call answered) for these leads but no activity has been scheduled. So it is essential that the count of this bucket should be as minimum as possible.
-
-
- **5) <u>Reengaged leads</u>**
-
- The leads which enquire through multiple sources, campaigns or mediums can be considered as Reengaged leads. Suppose there has been an enquiry from Google and the same lead enquires again through a hoarding number, this lead will reflect under "Reengaged leads" tab.
- So the enquiries consisting of more than one source, campaign or sub-source will reflect under this bucket.
-

Lead sources

Primary Lead Source

Pay Per Click PPC

Adwords

Yahoo Ads

Social Media

Facebook

Instagram

Linkedin

Organic Search

Primary Lead Source

Site 1

Site 2

Secondary Lead Source

Lead sources

Lead sources are the avenues through which you acquire leads. Common lead sources include social media, organic search, trade shows, inbound calls, etc.

Organic Search: When Lead comes through regular search on search engines. For example, if a person come to your website after finding it in search result on a search engine and then submits his contact information then the source will be classified as Organic Search. Note that it does not include Leads coming through paid online ads like google adwords.

Social Media: When a Leads comes through a link or post on social media sites like linkedin, facebook, twitter etc.
Email: When a Lead visits your website or Landing Page by clicking a link in your Email campaign then the Lead source is “Email Marketing”.
Inbound Call: The Leads that made a call to your company to inquire/buy your goods or services.
Outbound Call: The Leads whom your sales reps called to sell your company’s goods or services.
Customer Referral: The Leads that have been referred by one of your customers.
Partner Referral: The Leads that have been referred by one of your business partners.
by default lead source:–

-Organic Search
- Referral Sites
- Direct Traffic
- Social Media
- Inbound Email
- Inbound Phone Call
- Outbound Phone Call
- Email Marketing
- Pay per click Ads

These lead sources are relevant to most businesses, and you cannot delete them from your account. However, you can add your own lead sources that suit your business.

Lead Stages

This is the stage where Lead is part of all possible contacts that may collectively represent your universe of target

New Lead – Incoming

A Lead that is paying attention to your marketing methods and offers is called prospect. For example, a Lead that is opening your emails or visited your website and left the contact details.

Prospect

A prospect is any engaged Lead who may be in need of goods or services that your company offers.

Opportunity

A Lead moves into Opportunity stage when it qualifies the **Budget, Authority, Need, Timeline** (**BANT**) criteria:

Budget: The Lead has budget to buy your goods or services
Authority: The Lead has authority to buy
Need: Lead is in definite need of your goods or services
Timeline: There is a defined timeline to buy

Customer

When a Lead eventually buys your goods or services, it becomes a Customer.

Custom Stage: Each company or industry have their own set of stages. Example: Demo, Free Trial etc

Custom Lead Stages

Schema Name ProspectStage

Display Name * Lead Stage

Active Stages

- Prospect
- Opportunity
- Customer

Add

Inactive Stages

- Disqualified
- Invalid

Add

Comments on Stage Change

- [ ] Enable Comments on Stage Change

Other Properties

- [x] Is Mandatory
- [ ] Show in Quick Add
- [ ] Include in Mail Merge
- [x] Show in Import

Lead Status

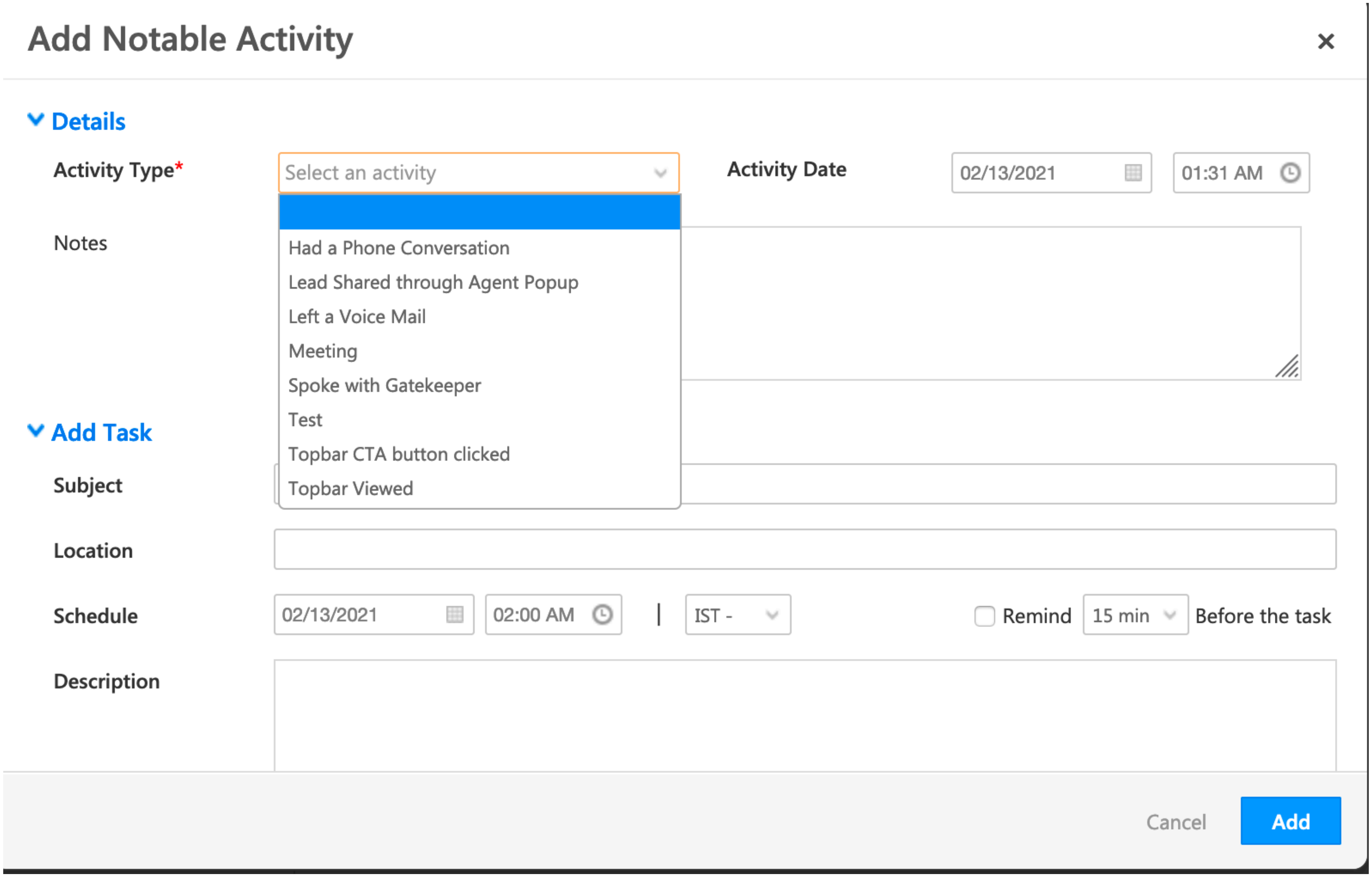
Hot	Maximum chances of converting the lead into a customer
Warm	Lead might convert into a customer.
Cold	Lead is not interested in services or product anymore

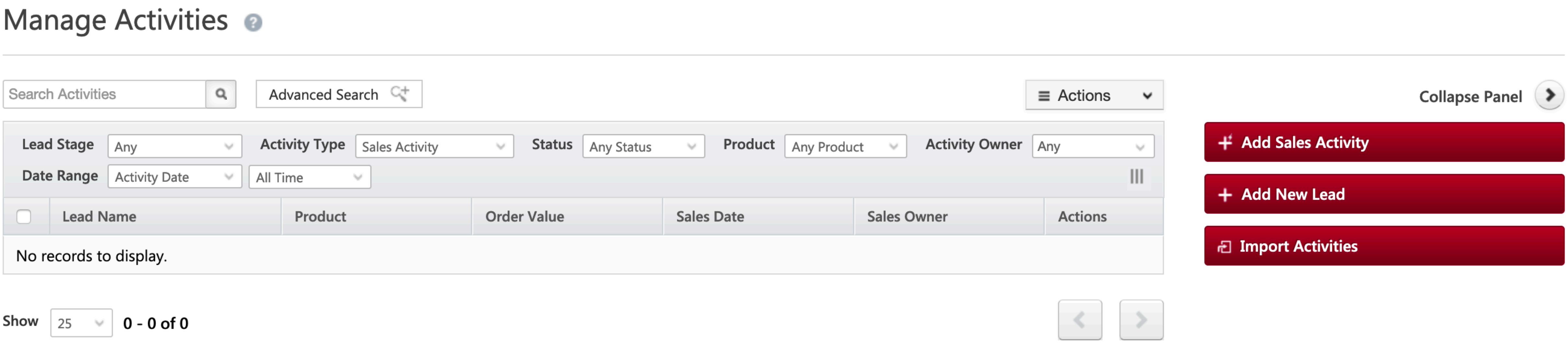
Lead Activities

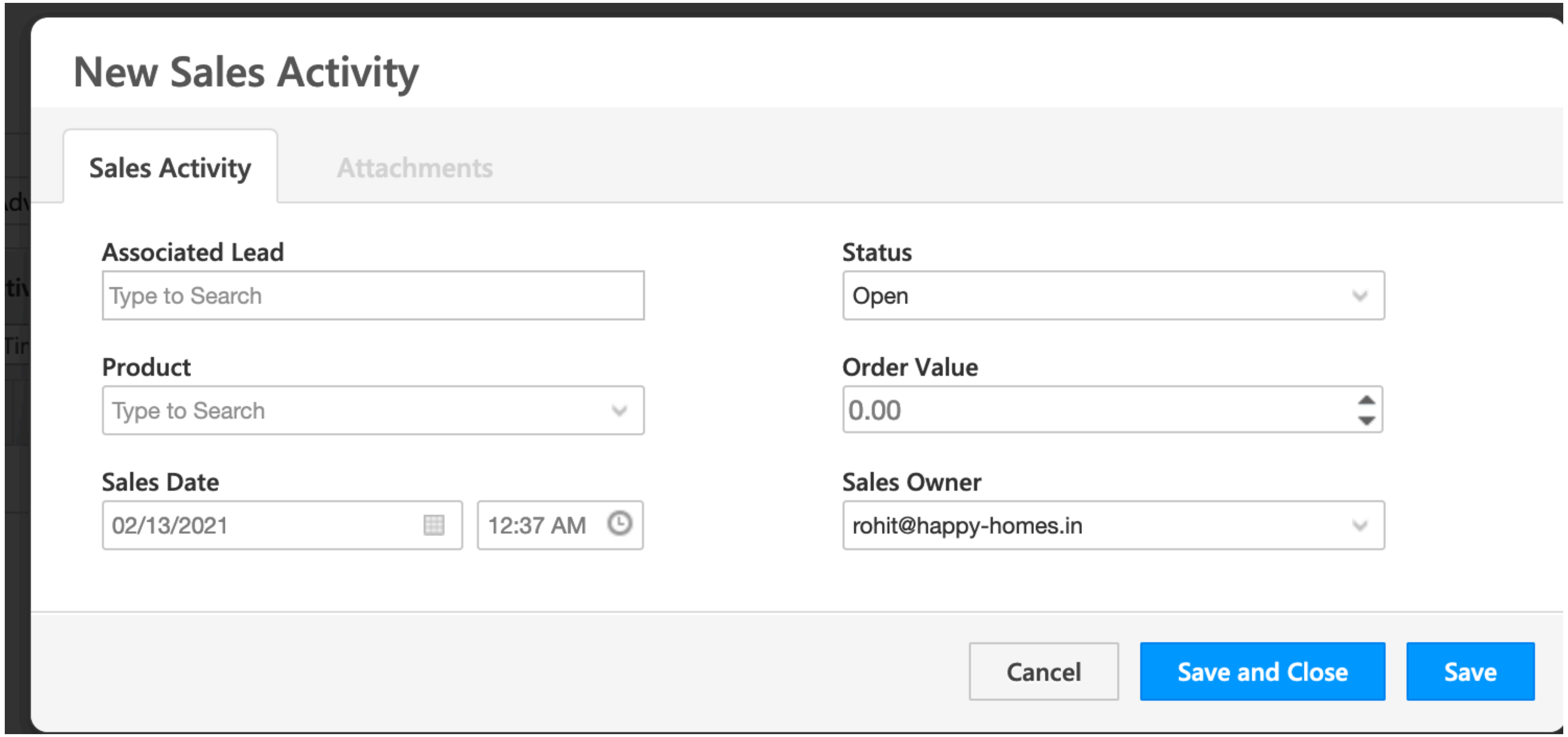
There are few basic activity types which can be used to create multiple type of activities:

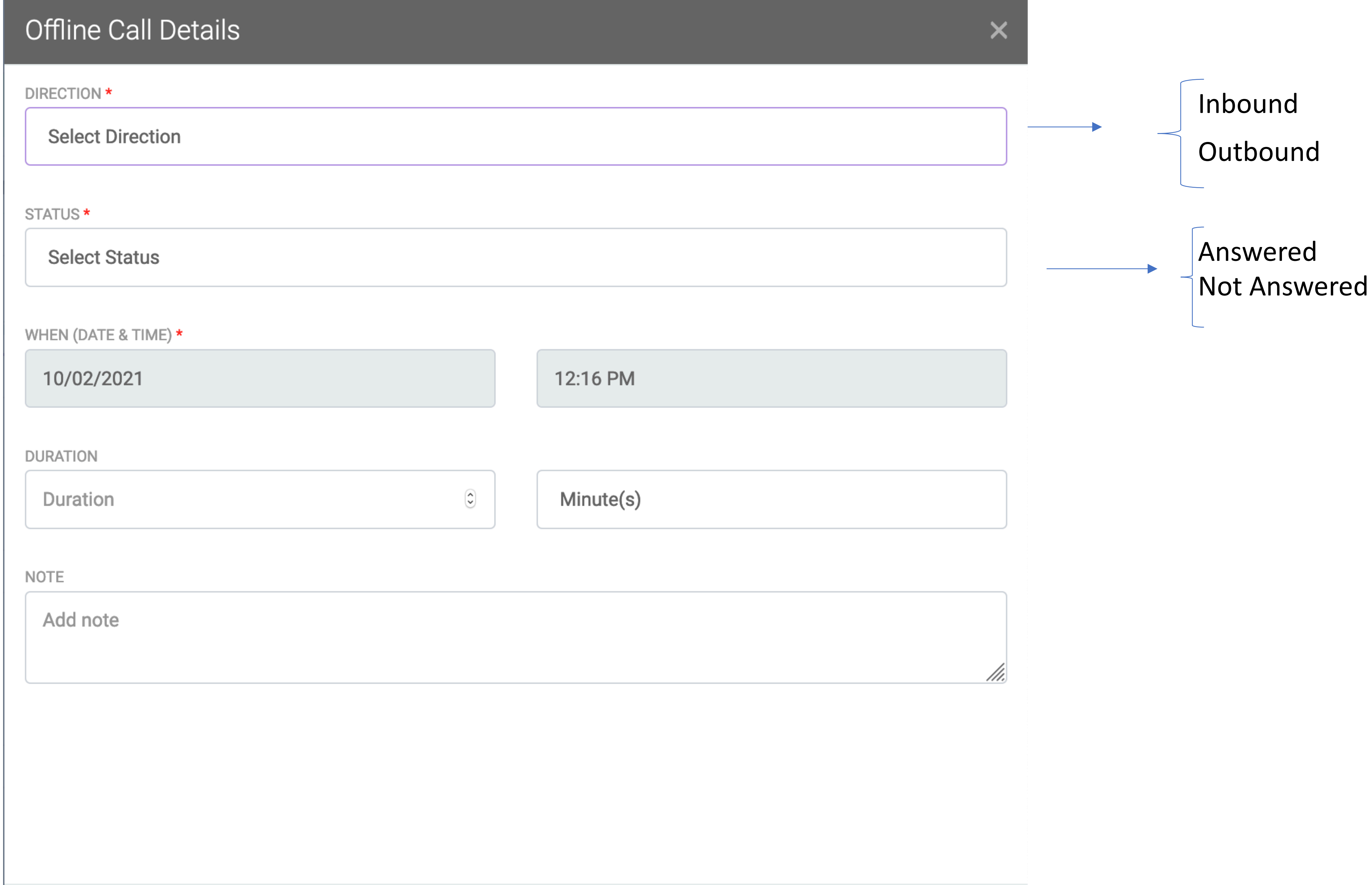
1. Call
2. Appointment (Call / Virtual / Physical / Home Visit / Site Visit)
3. Demo (Online / Offline)
4. Document Collection (Upload)
5. Document / Details Sharing
6. Visits
7. Approval from Higher Management
8. Quotation / Proposal etc
9. Closing / Leads converting into client
10. Transfer or share lead

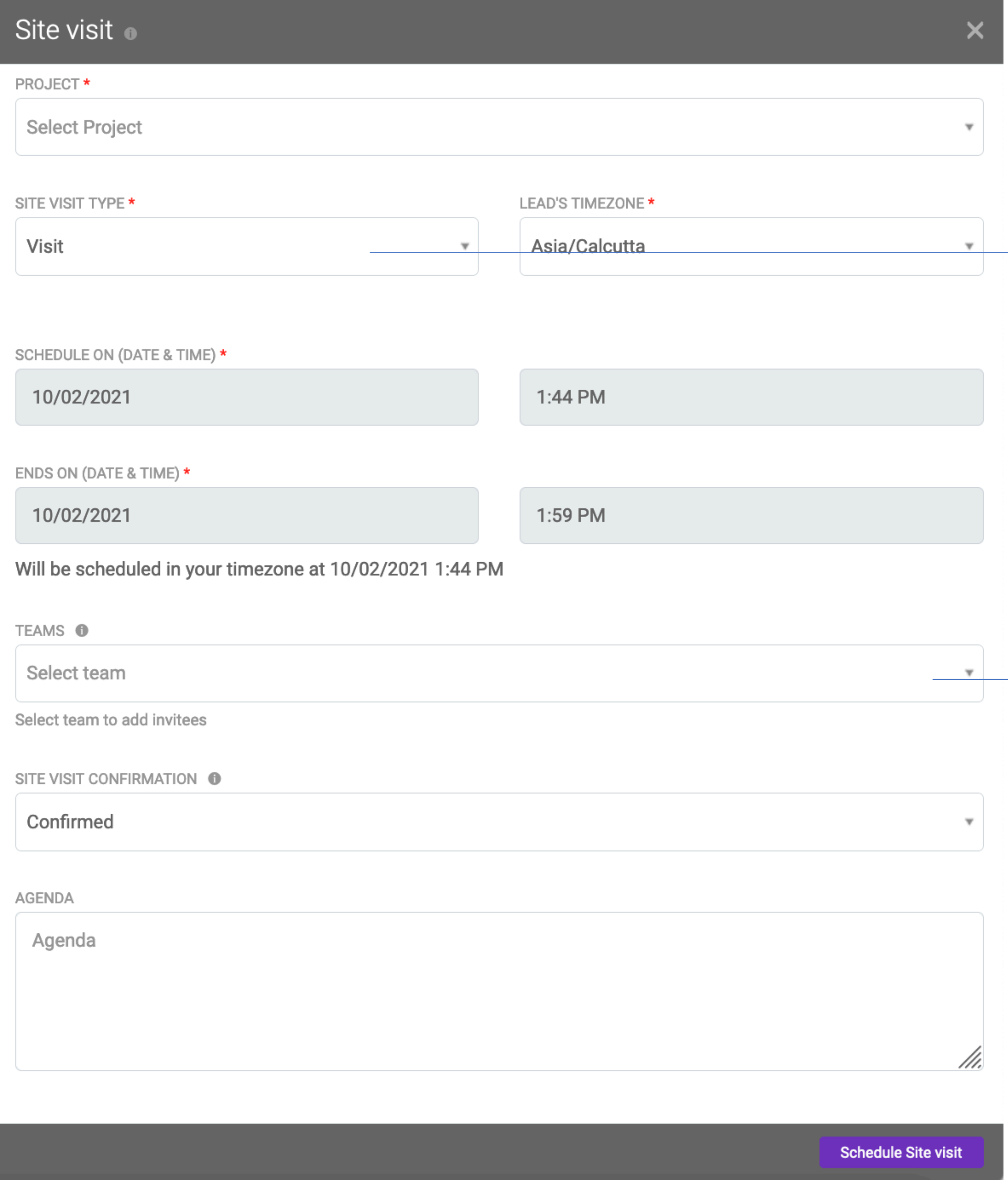
Depending on the nature of business these activities are also known as Customer Sign-up, Order Capture, Purchase Order, Paid Subscription, New Registration, Enrollment, New Deal etc.


Add Notable Activity
Details
Activity Type*
Select an activity
Had a Phone Conversation
Lead Shared through Agent Popup
Left a Voice Mail
Meeting
Spoke with Gatekeeper
Test
Topbar CTA button clicked
Topbar Viewed
Activity Date
02/13/2021
01:31 AM
Notes
Add Task
Subject
Location
Schedule
02/13/2021
02:00 AM
IST -
Remind
15 min
Before the task
Description
Cancel
Add


Manage Activities
Search Activities
Advanced Search
Actions
Collapse Panel
Lead Stage
Any
Activity Type
Sales Activity
Status
Any Status
Product
Any Product
Activity Owner
Any
Date Range
Activity Date
All Time
Lead Name
Product
Order Value
Sales Date
Sales Owner
Actions
No records to display.
Add Sales Activity
Add New Lead
Import Activities
Show
25
0 - 0 of 0


New Sales Activity
Sales Activity
Attachments
Associated Lead
Type to Search
Status
Open
Product
Type to Search
Order Value
0.00
Sales Date
02/13/2021
12:37 AM
Sales Owner
rohit@happy-homes.in
Cancel
Save and Close
Save


Offline Call Details
DIRECTION *
Select Direction
STATUS *
Select Status
WHEN (DATE & TIME) *
10/02/2021
12:16 PM
DURATION
Duration
Minute(s)
NOTE
Add note
Inbound
Outbound
Answered
Not Answered



Project Site Visit
Home Visit
Online Meeting

Assign A Team Member to greet with client our left blank to select self

Followup

SCHEDULE ON (DATE & TIME) *

Date

1:47 PM

LEAD'S TIMEZONE *

Asia/Calcutta

FOLLOWUP TYPE *

Call

Will be scheduled in your timezone at 10/02/2021 01:47 PM

SUBJECT

Subject

AGENDA

Notes / Agenda

Schedule Followup

Custom Activities

In addition to core activities, you can also create custom activities to accommodate your own unique use cases. You can also add fields within each custom activity to capture relevant data. Once you've created custom activity types, they will be available to be added against the leads and opportunities (from the Manage Activities page, the Lead Details page, etc.).

Here are some examples –

Industry	**Custom Activity**
Real Estate	Site Visit
Education	Attended Fair
Healthcare	Clinic Visit
Finance	KYC Document Collection
Travel	Itinerary Shared
Generic	Attended Webinar, Downloaded Document, Had a Phone Call

Add Custom Activity Type

×

Custom Activity Type Details, Step 1 of 3...

Name *

Description

Score 0

Direction ◉ Inbound ○ Outbound

Delete Activity ☑

Track Location ☐

Log Activity Changes ☐

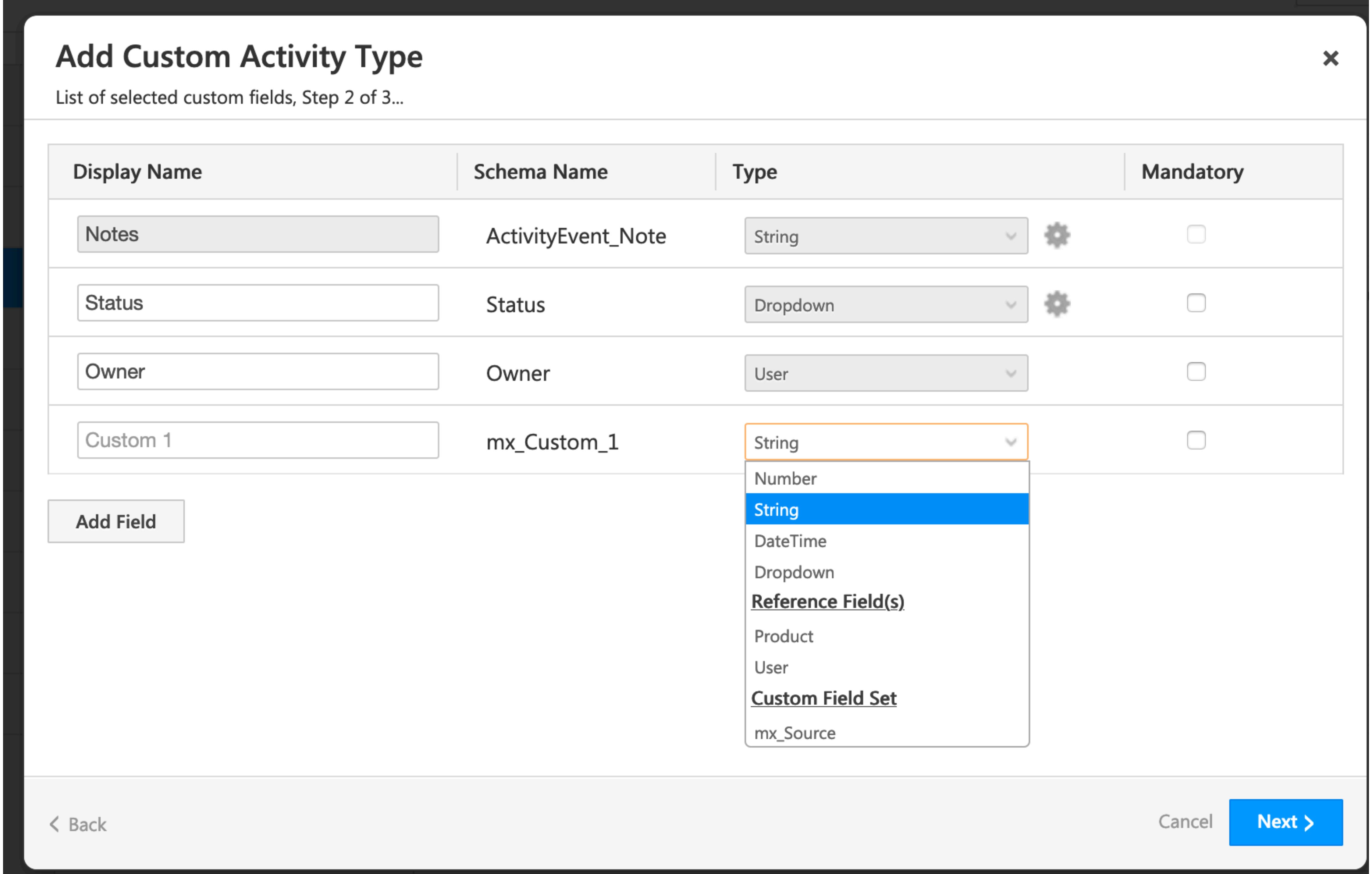
Allow pre-dated Activities ☑

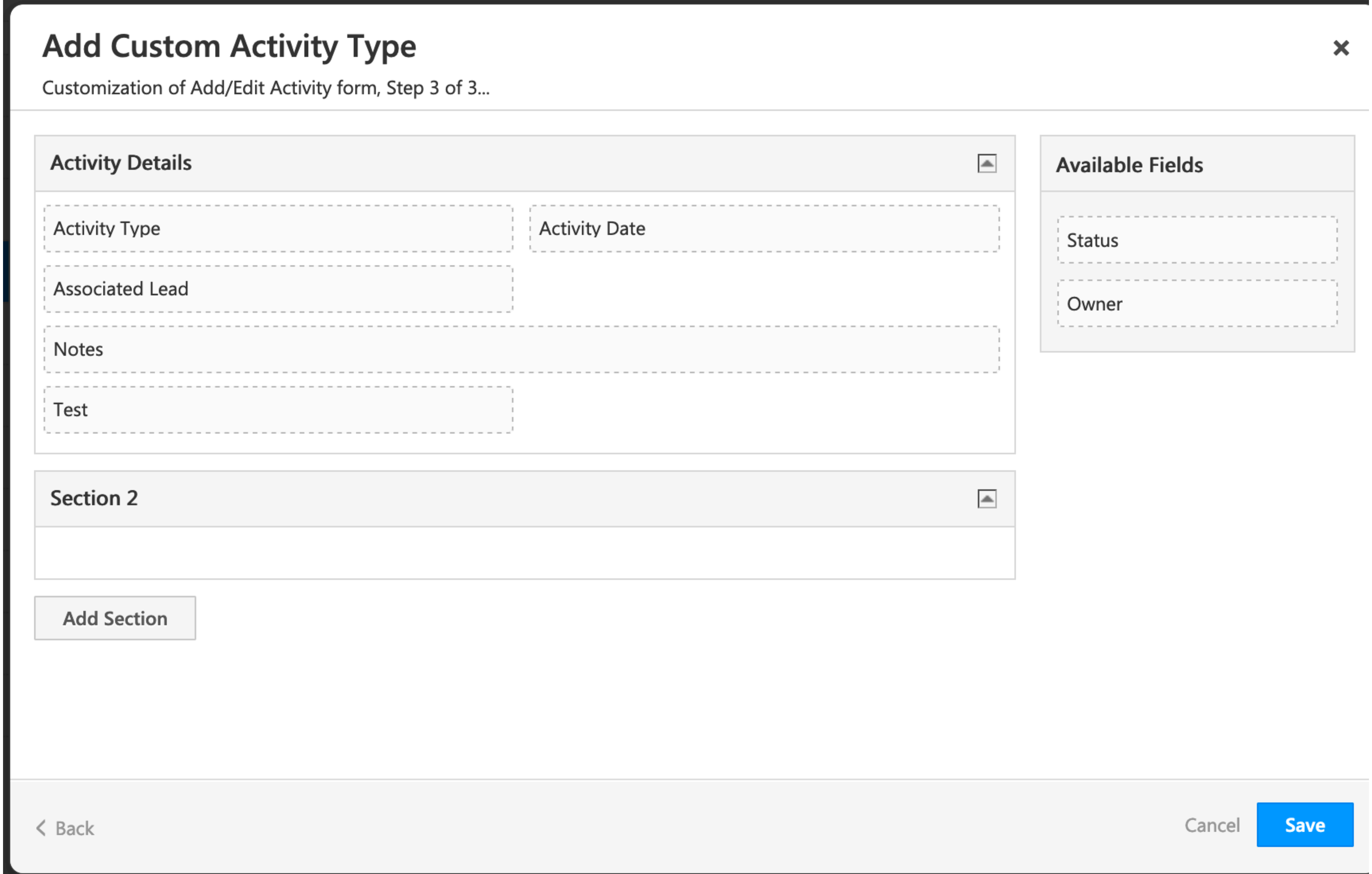
Show in Activity List ☐

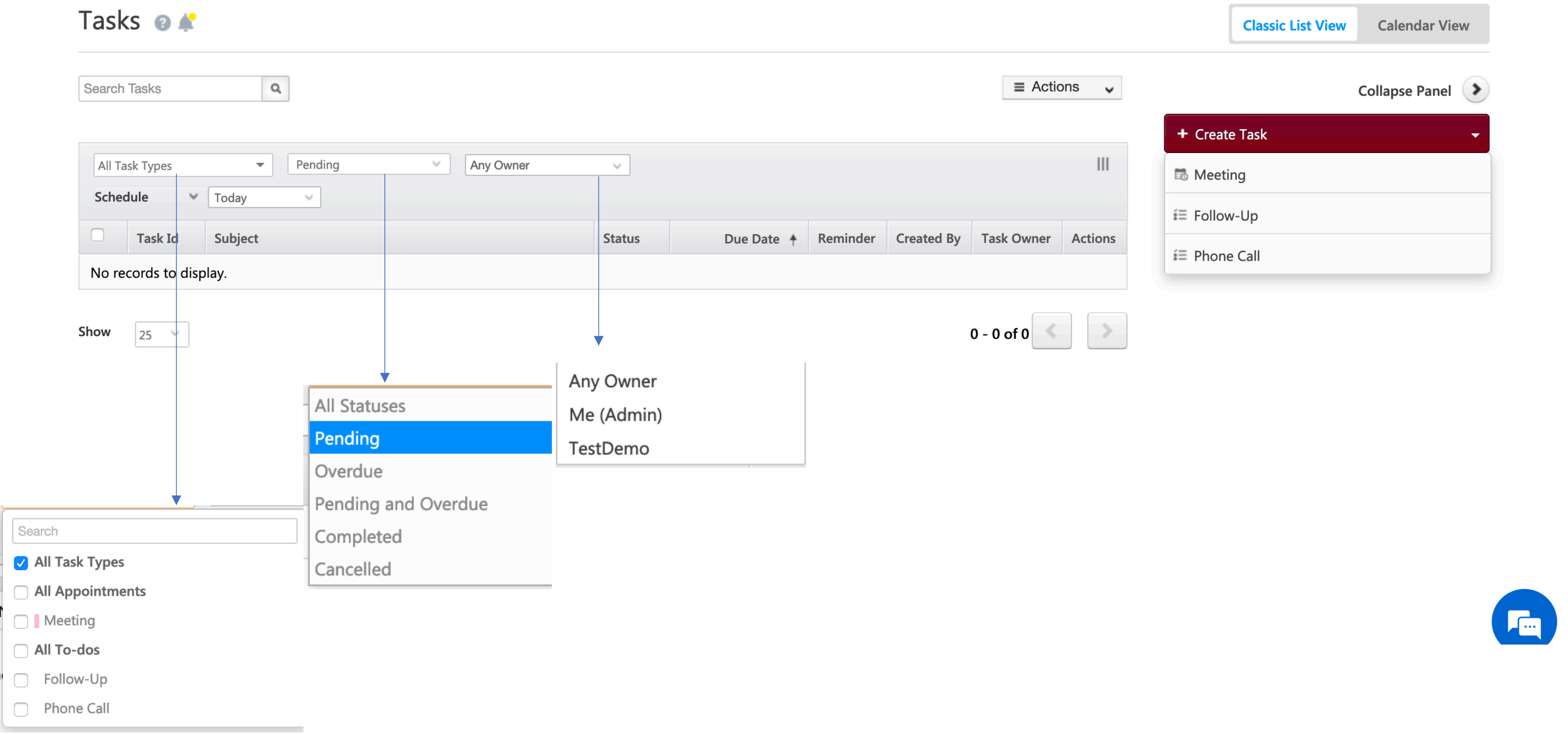
Allow Attachments ☐

Quick Add ☐

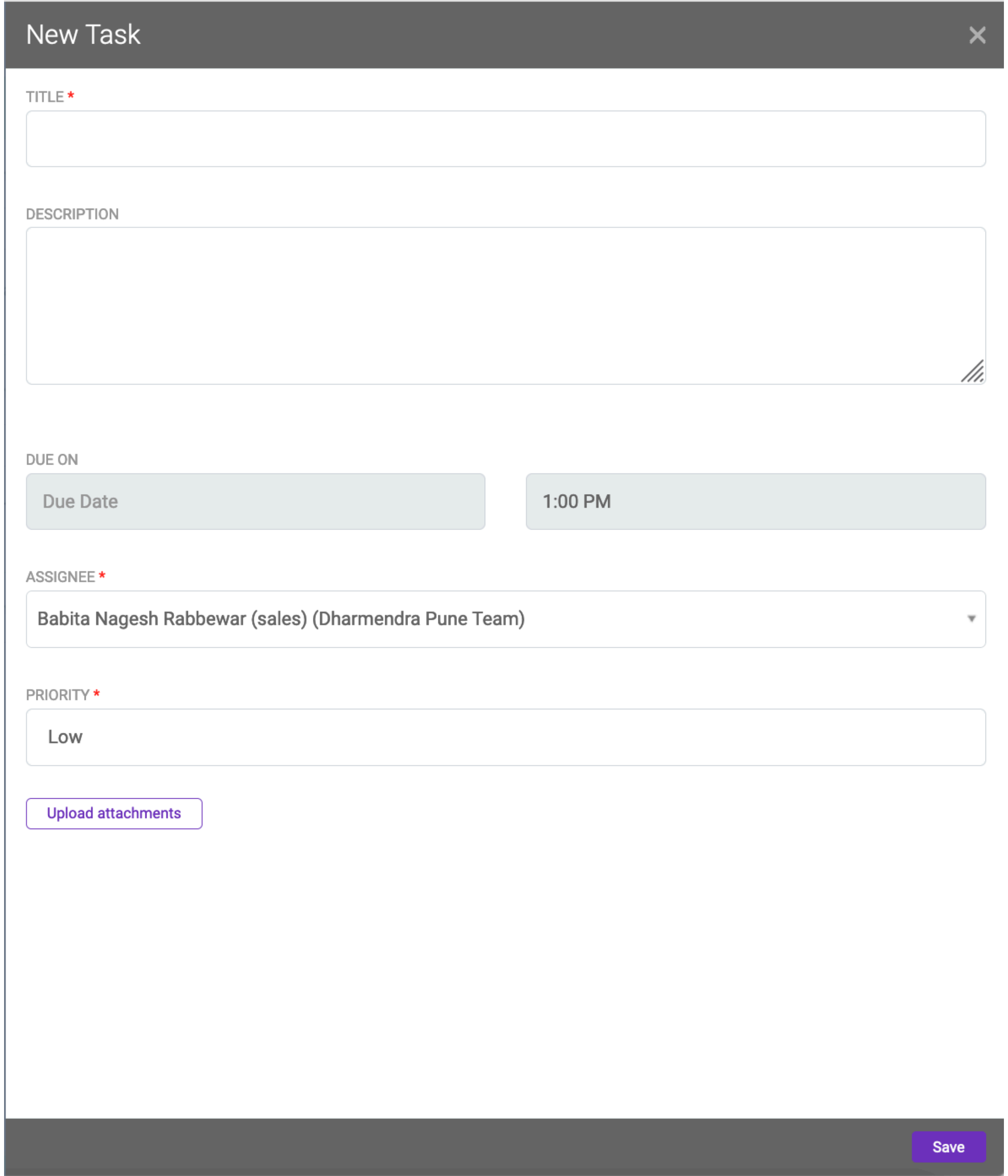
Cancel **Next ›**


Add Custom Activity Type
List of selected custom fields, Step 2 of 3...
Display Name
Schema Name
Type
Mandatory
Notes
ActivityEvent_Note
String
Status
Status
Dropdown
Owner
Owner
User
Custom 1
mx_Custom_1
String
Number
String
DateTime
Dropdown
Reference Field(s)
Product
User
Custom Field Set
mx_Source
Add Field
Back
Cancel
Next

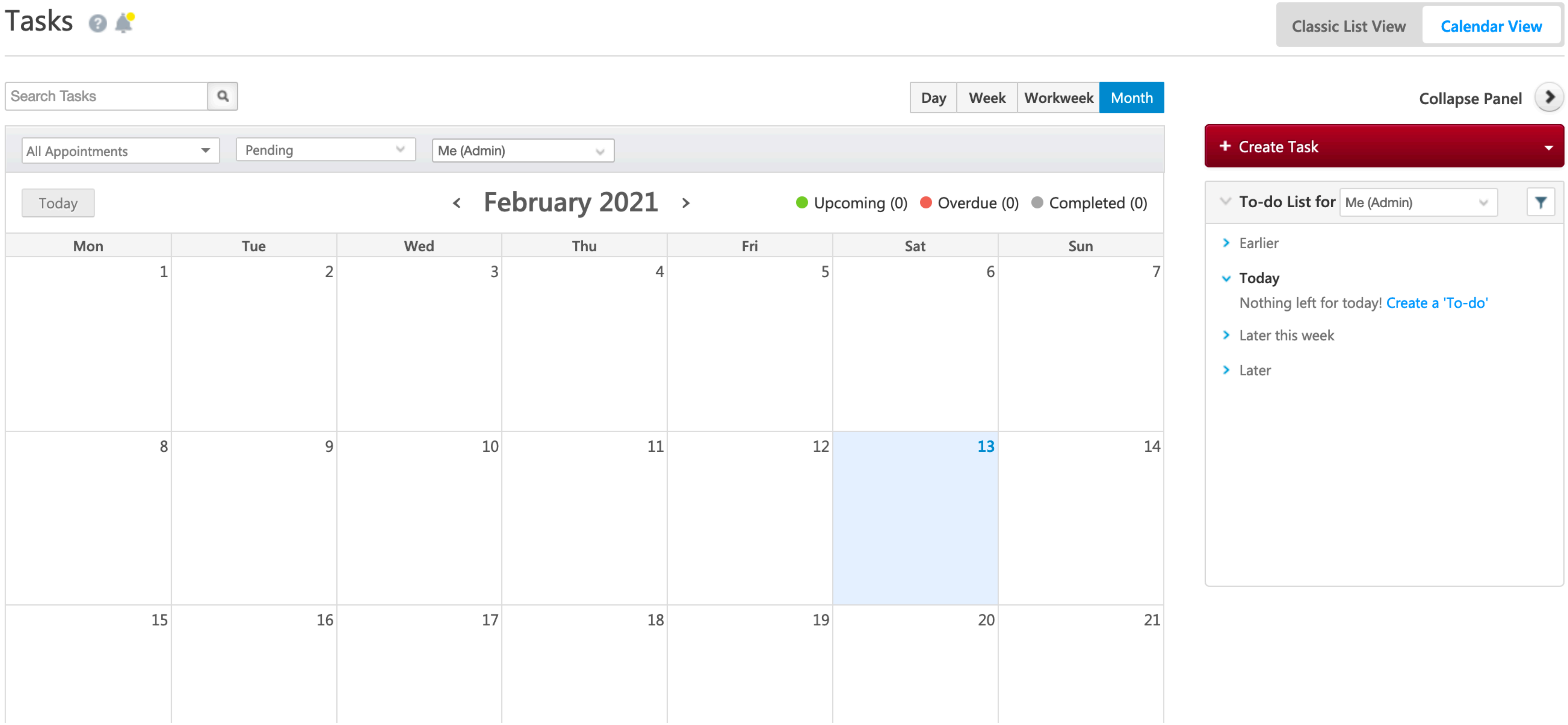

Add Custom Activity Type
Customization of Add/Edit Activity form, Step 3 of 3...
Activity Details
Activity Type
Activity Date
Associated Lead
Notes
Test
Section 2
Add Section
Available Fields
Status
Owner
Back
Cancel
Save

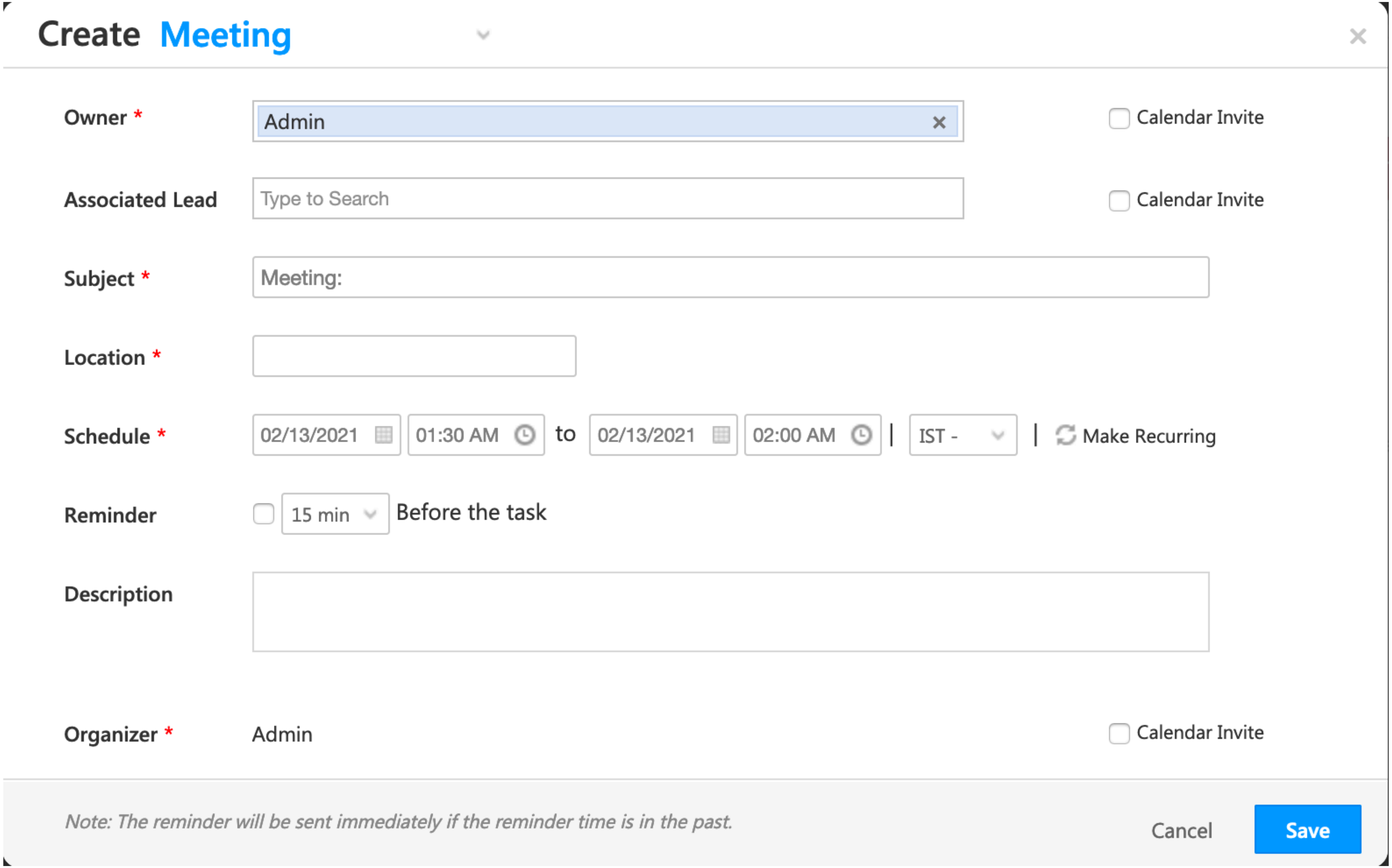


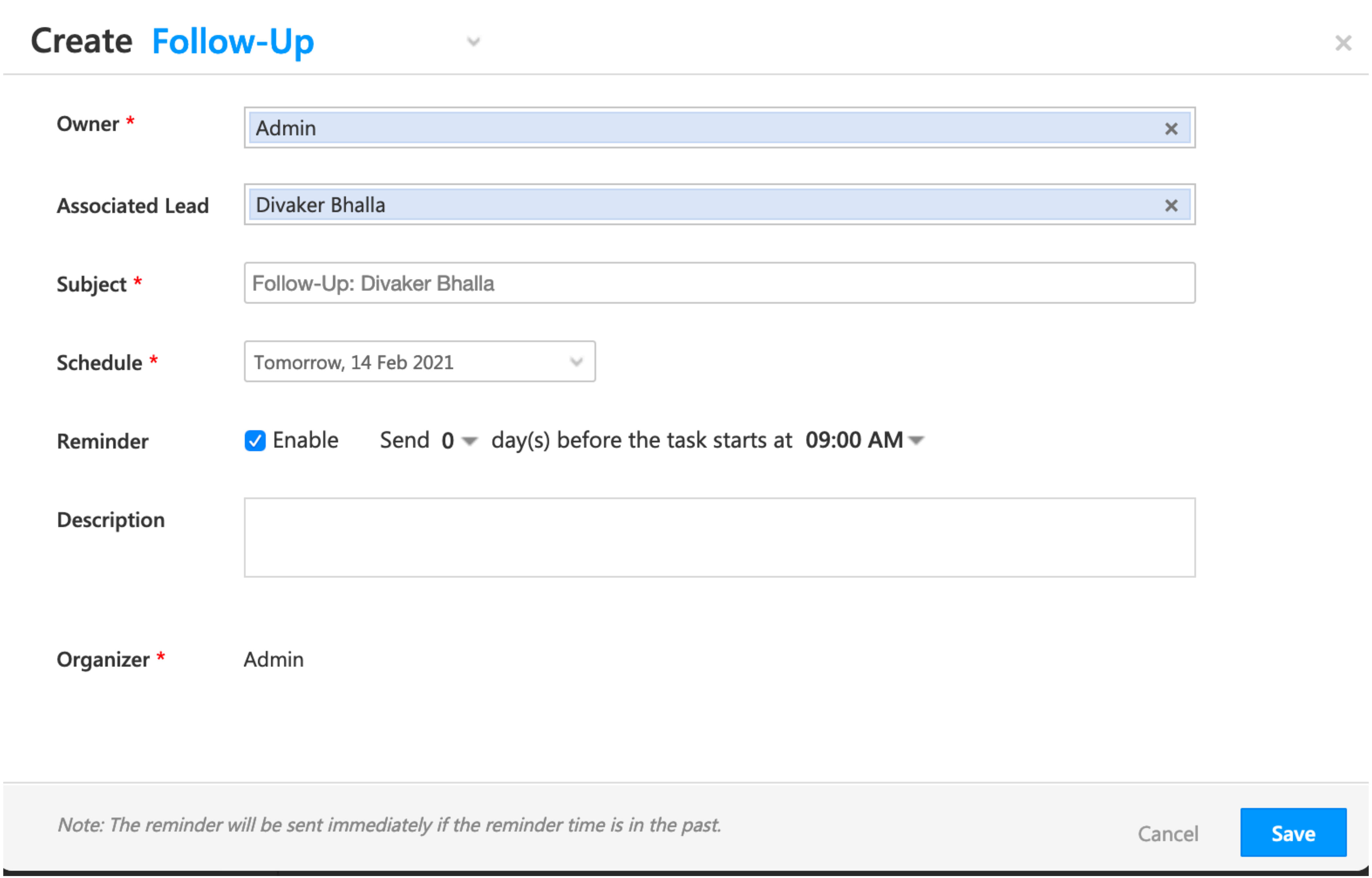
Tasks
Classic List View
Calendar View
Search Tasks
Actions
Collapse Panel
Create Task
Meeting
Follow-Up
Phone Call
All Task Types
Pending
Any Owner
Schedule
Today
Task Id
Subject
Status
Due Date
Reminder
Created By
Task Owner
Actions
No records to display.
Show
25
0 - 0 of 0
Any Owner
Me (Admin)
TestDemo
All Statuses
Pending
Overdue
Pending and Overdue
Completed
Cancelled
Search
All Task Types
All Appointments
Meeting
All To-dos
Follow-Up
Phone Call

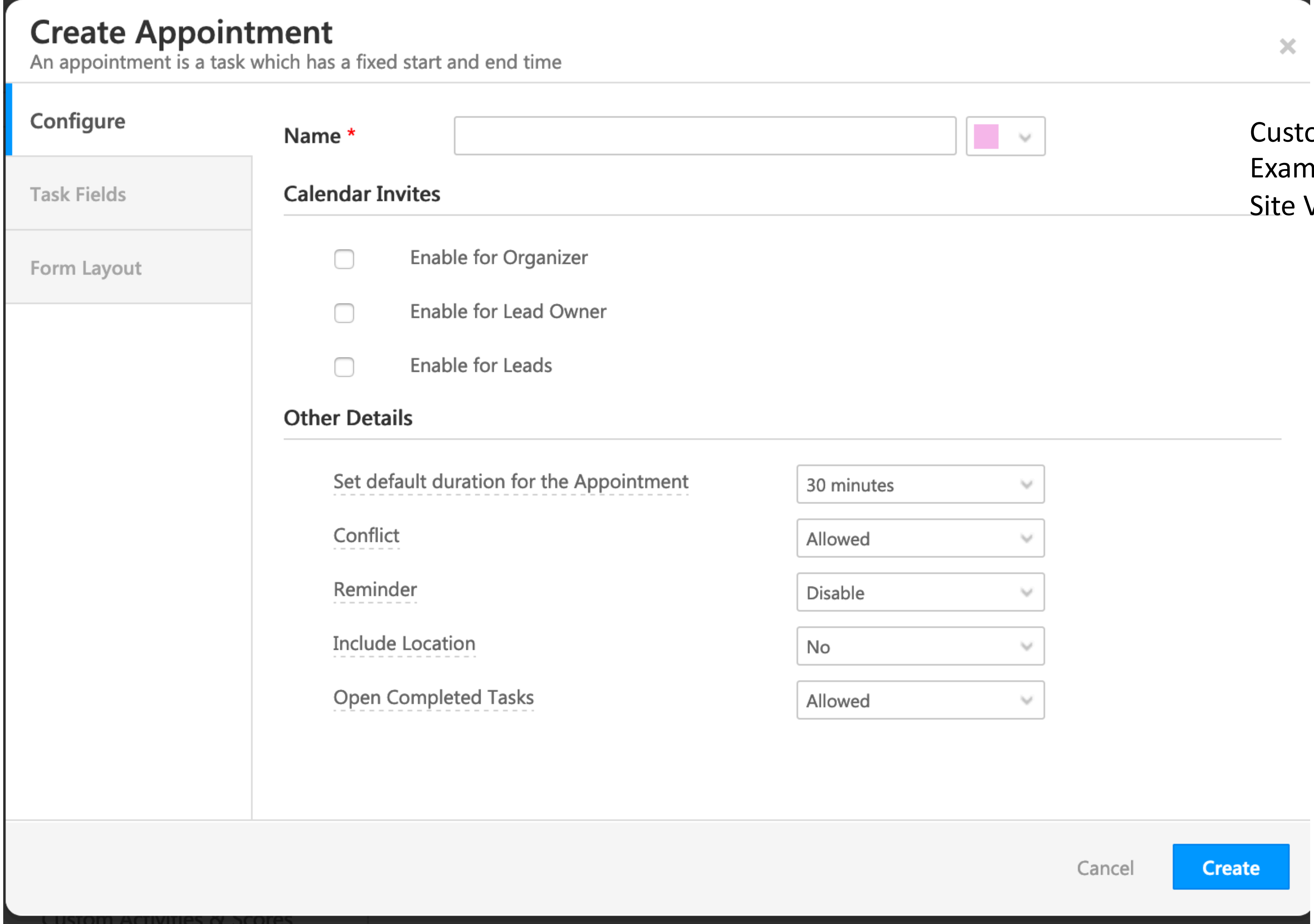

New Task
TITLE *
DESCRIPTION
DUE ON
Due Date
1:00 PM
ASSIGNEE *
Babita Nagesh Rabbewar (sales) (Dharmendra Pune Team)
PRIORITY *
Low
Upload attachments
Save

Add New Task


Tasks
Classic List View
Calendar View
Search Tasks
Day
Week
Workweek
Month
Collapse Panel
All Appointments
Pending
Me (Admin)
Create Task
Today
February 2021
Upcoming (0)
Overdue (0)
Completed (0)
To-do List for
Me (Admin)
Mon
Tue
Wed
Thu
Fri
Sat
Sun
1 2 3 4 5 6 7
8 9 10 11 12 13 14
15 16 17 18 19 20 21
Earlier
Today
Nothing left for today! Create a 'To-do'
Later this week
Later


Create Meeting
Owner *
Admin
Calendar Invite
Associated Lead
Type to Search
Calendar Invite
Subject *
Meeting:
Location *
Schedule *
02/13/2021
01:30 AM
to
02/13/2021
02:00 AM
IST -
Make Recurring
Reminder
15 min
Before the task
Description
Organizer *
Admin
Calendar Invite
Note: The reminder will be sent immediately if the reminder time is in the past.
Cancel
Save


Create Follow-Up
Owner *
Admin
Associated Lead
Divaker Bhalla
Subject *
Follow-Up: Divaker Bhalla
Schedule *
Tomorrow, 14 Feb 2021
Reminder
Enable
Send 0 day(s) before the task starts at 09:00 AM
Description
Organizer *
Admin
Note: The reminder will be sent immediately if the reminder time is in the past.
Cancel
Save



Custom Task Type
Example:
Site Visit –Home Visit etc

Create To-Do

A to-do is a task which has a due date and can be completed anytime before that

×

Configure

Task Fields

Form Layout

Name *

Other Details

Set default due date for To-Do	Tomorrow
Default Effort Estimate	30 Minute(s)
Reminder	Disable
Include Location	Yes
Geofence To-Do Location	No
Open Completed Tasks	Allowed

Cancel **Create**

Custom Task
To Do kind of tasks

Example: Send email to the customer on 5th jan at 3 pm

Edit To-Do

A to-do is a task which has a due date and can be completed anytime before that

×

- Configure
- **Task Fields**
- Form Layout

Display Name	Schema Name	Type	Mandatory
Owner	OwnerId	Dropdown	✓
Associated Lead	RelatedEntityId	Dropdown	
Subject	Name	Text	✓
Location	Location	Text	
Schedule	DueDate	DateTime	✓
Reminder	Reminder	Dropdown	
Description	Description	Text	
Organizer	CreatedBy	Text	✓

Add Field

< Back

Cancel | Save and Close | Next

Edit To-Do

A to-do is a task which has a due date and can be completed anytime before that

×

- Configure
- Task Fields
- **Form Layout**

Task Details

- Owner *
- Associated Lead
- Subject *
- Schedule *
- Reminder
- Description
- Organizer *

Available Fields

- Location
- Priority
- Effort Estimate
- Custom 1

Add Section

< Back

Cancel | Save and Close | Update

Dashboard

NEW ENQUIRIES	UNREAD EMAILS
6	1
since 23 days	since 2 months

MISSED CALLS	NO FUTURE ACTIVITY	RE ENGAGED LEADS
11	131	11
since a year	since 23 days	N/A

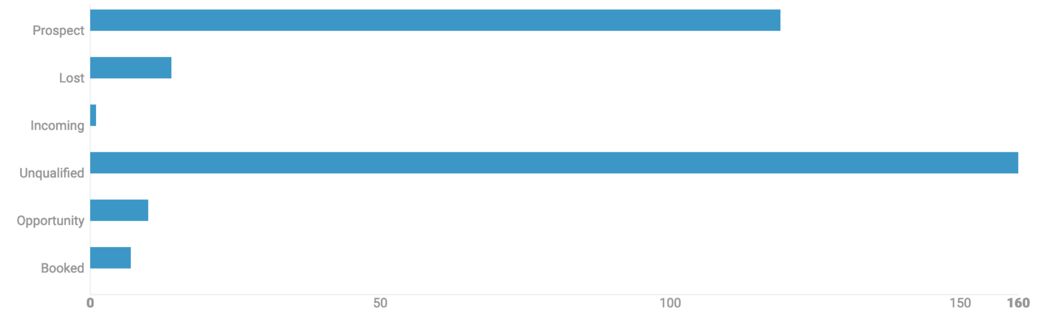
Team Performance

6 Selected

SALES	TEAM	TALKTIME	TOTAL OUTGOING	OUTGOING ANSWERED	TOTAL INCOMING	INCOMING ANSWERED	TOTAL
Varun Sharma	Varun's Noida Team	0	0	0	0	0	0
Babita Nagesh Rabbewar	Dharmendra Pune Team	0	0	0	0	0	0
Lovleen Kaur	Dharmendra Pune Team	0	0	0	0	0	0
Dharmendra Chhabra	Dharmendra Pune Team	0	0	0	0	0	0
Monika Wagh	Dharmendra Pune Team	0	0	0	0	0	0
Akash Kachhwani	Dharmendra Pune Team	0	5	0	0	0	5

Pipeline Analysis

TOTAL LEADS
311



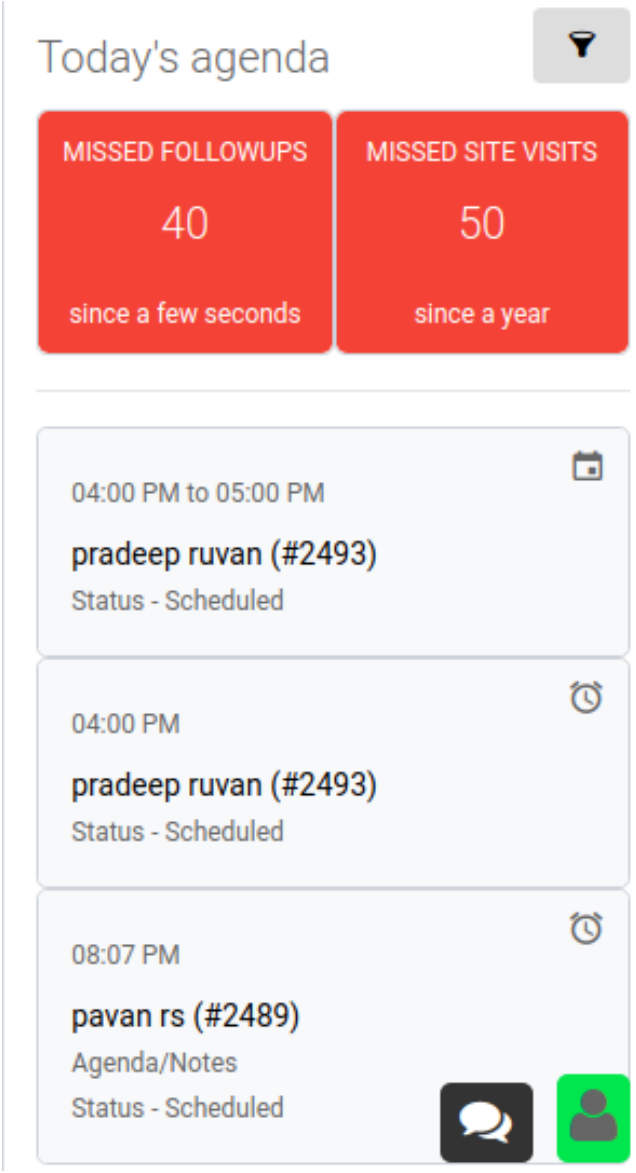
Today's agenda

MISSED FOLLOWUPS	MISSED SITE VISITS
40	50
since a few seconds	since a year

04:00 PM to 05:00 PM
pradeep ruvan (#2493)
Status - Scheduled

04:00 PM
pradeep ruvan (#2493)
Status - Scheduled

08:07 PM
pavan rs (#2489)
Agenda/Notes
Status - Scheduled



"Today's agenda" can be considered as a notifier to highlight the activities that you have scheduled for the current day. Missed follow-ups, missed site visits, today's follow-ups and site visits fall under this section.

Missed follow-ups

This bucket will show the count of leads for which the follow-ups that were scheduled have been missed. In other words, if a follow-up has been scheduled for the day and the sales or pre-sales is not able to call the lead during that course of the day, then the follow-up will be reflected as "missed". All such leads for which the follow-up has been missed will reflect under this bucket; be it yesterday, day before or last week as well. Once the call has been initiated to the lead, the lead will move out from this bucket.

Missed site-visits

This bucket is the same as the above bucket; the only difference being that the leads for which the site-visits were missed will be reflected under this bucket.

Today's site visits and follow-ups

The site visits and follow-ups scheduled for the day are displayed along with the lead id and the name of the lead so that the sales can have a complete plan of the activities that are to be performed during the course of the day. Also, notifications are sent to the lead as well as the sales/pre-sales to inform them about the time of the scheduled activity.

We have a pre-defined pipeline structure for the lead so that the sales/pre-sales can differentiate between the qualified and unqualified leads. We can also add new custom stages depending upon the company's requirements so that they can define and manage the leads easily.

We have defined 6 stages in Sell.Do depending upon the communication established between the sales and the lead. The stages are as follows :-

1) Incoming

The leads received in the "New enquiries" bucket for which the connection has not been established yet (no calls answered) will fall under **Incoming** stage; i.e. suppose if there is call made by a new lead and the call was left unanswered, then this lead will fall under Incoming stage only.

2) Prospect

When atleast one call is answered for a lead, the stage of the lead will directly be changed from Incoming to Prospect. The sales doesn't have to manually change the stage of the lead.

3) Opportunity

If the Prospect lead shows interest in the property and attends the site as well, then the lead can be marked as an **Opportunity** lead manually. This means that the lead is a qualified lead. This stage can be further categorised into following stages :-

Hot leads - These leads have a high probability of getting converted into Booked customers.

Warm leads - These leads have comparatively less probability to be converted into Booked customers; hence additional efforts need to be taken for such leads.

4) Unqualified

The Prospect leads can be marked as Unqualified if the lead doesn't show interest in the property at an initial stage itself. In order to mark a lead as Unqualified, a proper reason should be entered in the form that pops-up (reasons include "Not answering calls", "Invalid number", "Budget mismatch", "Location mismatch" etc.)

5) Booked

The Opportunity leads that have booked the property can be marked as **Booked** in the system. While marking a particular lead as Booked, the sales must enter Booking details in the booking form that pops-up.

6) Lost

An Opportunity lead who had shown interest in the property but due to some reasons is not able to buy the property (the reasons include Loan issues, Booked with a competitor). Such leads can be marked as Lost manually in the system.

1) <u>Contact New Leads</u>

It shows the Leads for which communication has not been established yet (call not answered). These are nothing but New enquires.
Click Contact New Leads from the drop-down to view the list of **New Enquiries**.

2) <u>Missed Calls</u>

The leads with missed calls will show once the sales clicks on Missed Calls. This means the count of those leads who tried calling but the sales couldn't answer the call. Click **Missed Calls** from the drop-down to view the list of leads with Missed calls.

3) <u>Untouched Leads- 1 Attempt</u>

Consider a scenario wherein for an untouched lead (connection not established), the sales tried calling the lead but the call was not answered by the lead during the 1st attempt. Such leads will come under this list. Click **Untouched Leads - 1 Attempt** from the drop-down to view the list of these leads.

4) <u>Untouched Leads- 2 Attempts</u>

Consider a scenario wherein for an untouched lead (connection not established), the sales tried calling the lead but the call was not answered by the lead twice. Such leads will come under this list. Click **Untouched Leads - 2 Attempts** from the drop-down to view the list of these leads.

5) <u>Untouched Leads- 3+ Attempts</u>

Consider a scenario wherein for an untouched lead (connection not established), the sales tried calling the lead but the call was not answered by the lead thrice or more than that. Such leads will come under this list. Click **Untouched Leads - 3+ Attempts** from the drop-down to view the list of these leads.

6) <u>Scheduled Follow-ups</u>

This list will show all the leads for which the status of the follow-ups is Scheduled. The sales can view all these leads and conduct the follow-ups (via call/email). Click **Scheduled Follow-ups** from the drop-down to view the list of those leads.

7) <u>Unread Emails</u>

This count of this list is same as the Unread emails bucket. Click **Unread Emails** from the drop-down to view the list of these leads.

8) <u>Scheduled Site visits</u>

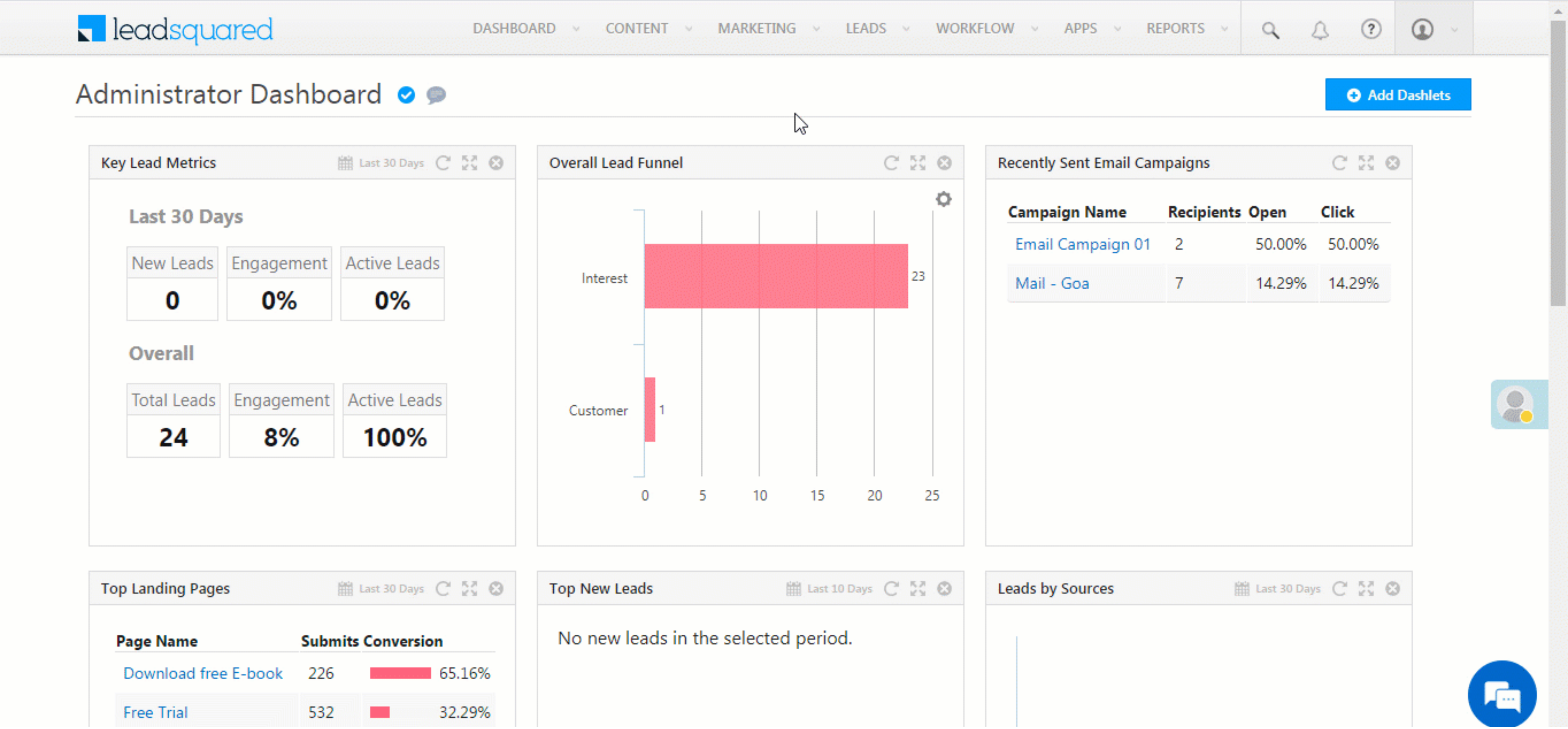
This list will show all the leads for which the status of the site visit is Scheduled. Once the status is updated; i.e. marked as conducted, marked as missed; the leads will move out from this list. Click **Scheduled Site Visits** from the drop-down, to view the list of these leads.

9) <u>Call Later</u>

This list will show the leads who did not answer the calls that were initiated by the sales/pre-sales.
Click **Call Later** from the drop-down to view the list of these leads.

10) <u>Reassigned to me</u>

The leads which have been reassigned to you some other pre-sales/sales/manager will reflect under this list. You can now perform all the activities such as call/email/sms on these leads.
Click **Reassigned to me** from the drop-down to view the list of these leads.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CONTENT
MARKETING
LEADS
WORKFLOW
APPS
REPORTS
Administrator Dashboard
Add Dashlets
Key Lead Metrics
Last 30 Days
Last 30 Days
New Leads
0
Engagement
0%
Active Leads
0%
Overall
Total Leads
24
Engagement
8%
Active Leads
100%
Overall Lead Funnel
Interest
23
Customer
1
0
5
10
15
20
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Recently Sent Email Campaigns
Campaign Name
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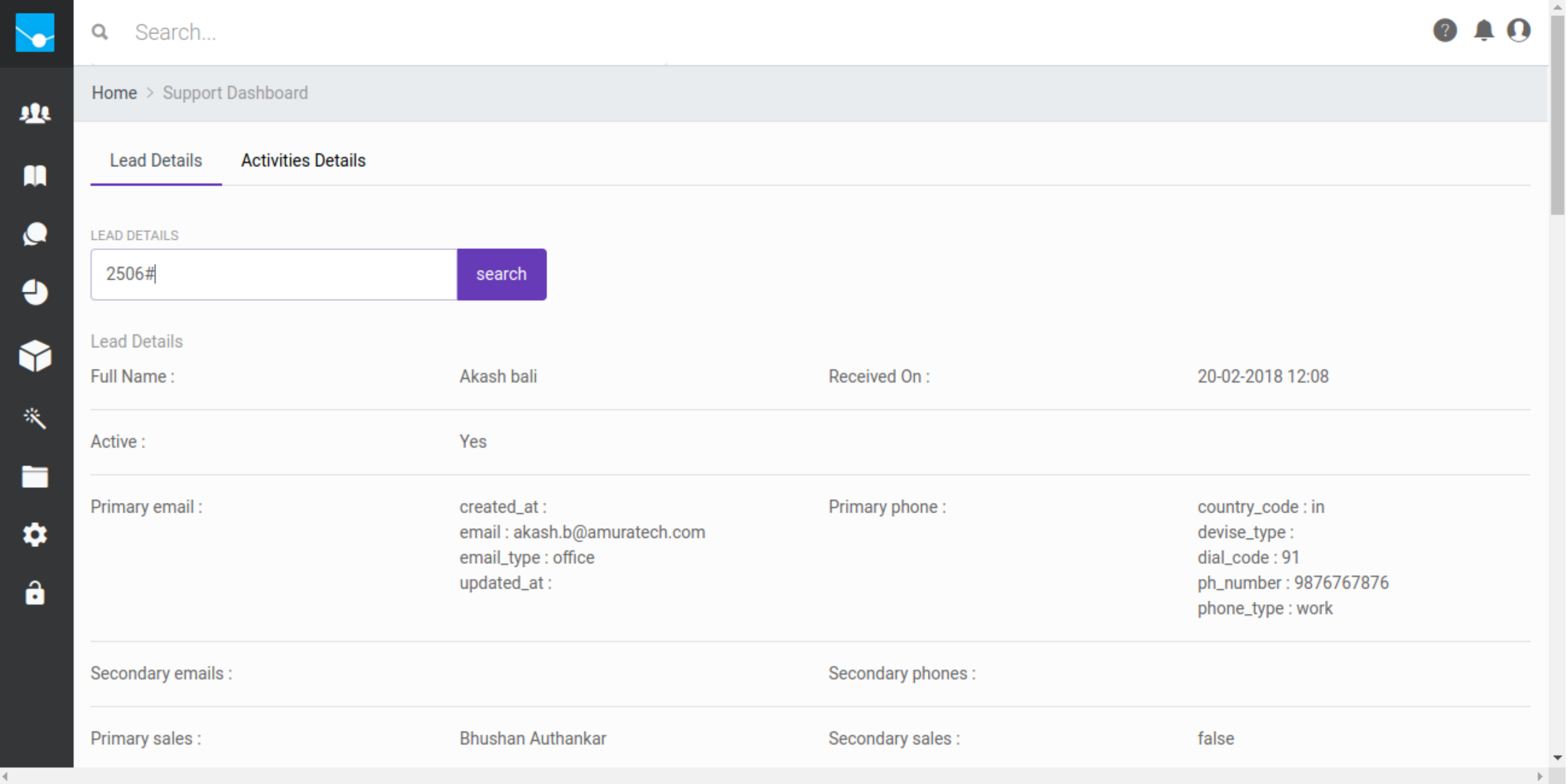
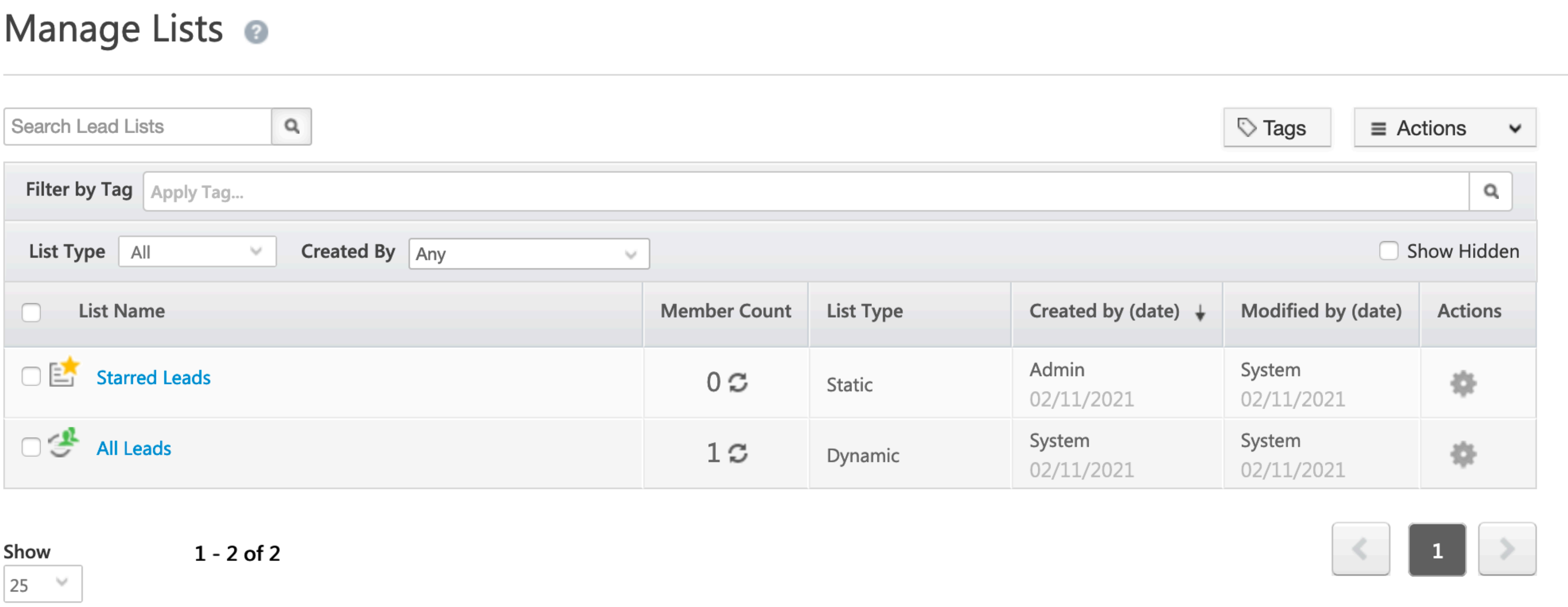
No new leads in the selected period.
Leads by Sources
Last 30 Days



Lead search feature enables admin user to check the lead details by searching any lead with email, phone number or lead id. In order to search lead using lead id, kindly enter lead id followed by "#".

If the lead already exists in the system, all the details of the leads will be visible to admin including the lead information, lead stage, contact information, call status and call info for lead, site-visit and project and campaign details. Refer below screenshot in order to view the lead search details :-



What is Static List?

Static List has fixed number of Leads. The list can only be changed by manually deleting, adding or importing Leads.

What is Dynamic List?

Dynamic List is a set of Leads defined by a specific criteria. The criteria could be attributes or activities of Leads. The number of leads in the list will change based on which leads meet the criteria specified in the list definition.