

2.1.1. Registering a lead

Creating a lead

Users can create a lead by 2 methods:

- 1. By using the leads documents screen

CRM CRM Documents Leads Create

Date	Number	Status	Topic	Company	Company Phone	Contact Person	Contact Person P
3/29/2022	MELD23-0000001	First Meeting	moon link #1221	moon link llc	3243432	Abul	971434355
8/16/2023	MELD23-0000001	New	Pool construction request	Ahmed	44062321		
8/16/2023	MELD23-0000002	First Meeting	Villa (Dubai Hills) Construction	Damac	97146543421		
8/16/2023	MELD23-0000003	BOQ	MEP work Opal tower	Smart Choice	9717647637	Ann	320994422
8/16/2023	MELD23-0000004	Quotation	Villa Design and Fitout request	Osama Syed	457312550		

- 2. By using the leads pipeline screen

CRM Tools Leads Pipeline Create

New	First Meeting	BOQ	Quotation	Won	Lost
0,00 AED	0,00 AED	0,00 AED	0,00 AED	0,00 AED	0,00 AED
MELD23-0000001 Ahmed 0,00 AED, 321 day(s) Pool construction request Alex	MELD22-0000001 moon link llc 0,00 AED, 87 day(s) moon link #1231 Yusuf MELD23-0000002 Damac 0,00 AED, 321 day(s) Villa (Dubai Hills) Construction	MELD23-0000003 Smart Choice 0,00 AED, 321 day(s) MEP work Opal tower Nellai	MELD23-0000004 Osama Syed 0,00 AED, 321 day(s) Villa Design and Fitout request Nick		

Filling required information about the lead (bid)

← → ☆ **Lead MELD23-00000003 dated 16.08.2023 11:46:28**

Main Approvals History of Approval History of Object Status Changes Taken Decisions

Save and close Save Create Project Phone Call E-mail Meeting Generate

Status: BOQ Closed

Main Lead Documents

Topic: MEP work Opal tower Number: MELD23-00000003 From: 16.08.2023 11:46:28

Source of Request: Consultant Entity: MRB Engineering and Contracting

Responsible: Nellai Main Contractor:

Submit till Date: . . Consultant:

+ Create Project Budget of Lead: 0,00

Company Info

Search:

Existing Company: Existing Contact Person:

Company: Smart Choice Contact Person: Ann

Contract: # 123 from (AED) Phone: 320994422

Phone: 9717647637 Email:

Fax: Position:

E-mail: sales@smc.com

Description

Comment

Draft

Recorded Administrator

In the main tab,

- **Status** - for new leads, the system fills status "New" by default. Lead status settings can be changed by admin user.
- **Standard attributes** - **Date** (date of lead registration, the system will set a current date by default), **Number** (system-generated sequence number of lead. Will be set automatically at the time of saving), **Entity** (our company, which received this enquiry)
- **Topic** - Short description of request.
- **Source of request** - a channel where enquiry came.
- **Responsible** - the employee to whom this lead is assigned (usually a salesman).
- **Submit till date** - End date of submission
- **Project** - a reference to a project master. A new project will be created automatically by using the "Create Project" button.
- **Budget** - users can mention the preliminary budget (potential value of this deal).
- **Company** info area. Here you can search for an existing client or create a new one.
 - **Search** - field allows to search company by part of the phone number, email, or company description. If the entered text matches with any company in companies catalog, the company will be displayed in the search results screen for future selection as an existing company.
 - **New Company** - button will create and save the new company in the companies catalog by using the filled details (Name, Phone, Fax, Email).
 - **New Contact person** - button will create and save a new contact person for the company filled in the company field.
- **Description** - text field is intended for details about the enquiry.
- **Comment** - text field is intended for internal notes about the enquiry.

In the Lead Documents tab, all documents related to the lead will be displayed.

Status: Closed

Main

Search (Ctrl+F)

Document	#	Date	Comment	Status	Author
Project Estimates	MEPE22-00000018	28.03.2022		In work	Administrator
Quotation	MEQTN22-QT00003	28.03.2022		Approved	Administrator
Project Estimates	MEPE22-00000019	28.03.2022		In work	Administrator
Project Budget	MEPE22-00000023	28.03.2022		In work	Administrator
Quotation (Revision)	MEQTN22-QT00003-01	28.03.2022		In work	Administrator

Saving information

Use the **Save** or **Save and close** buttons to record this enquiry in your database.

After saving lead will appear in the Lead documents list as well as in the Leads Pipeline under the mentioned status.