# Sales Leads

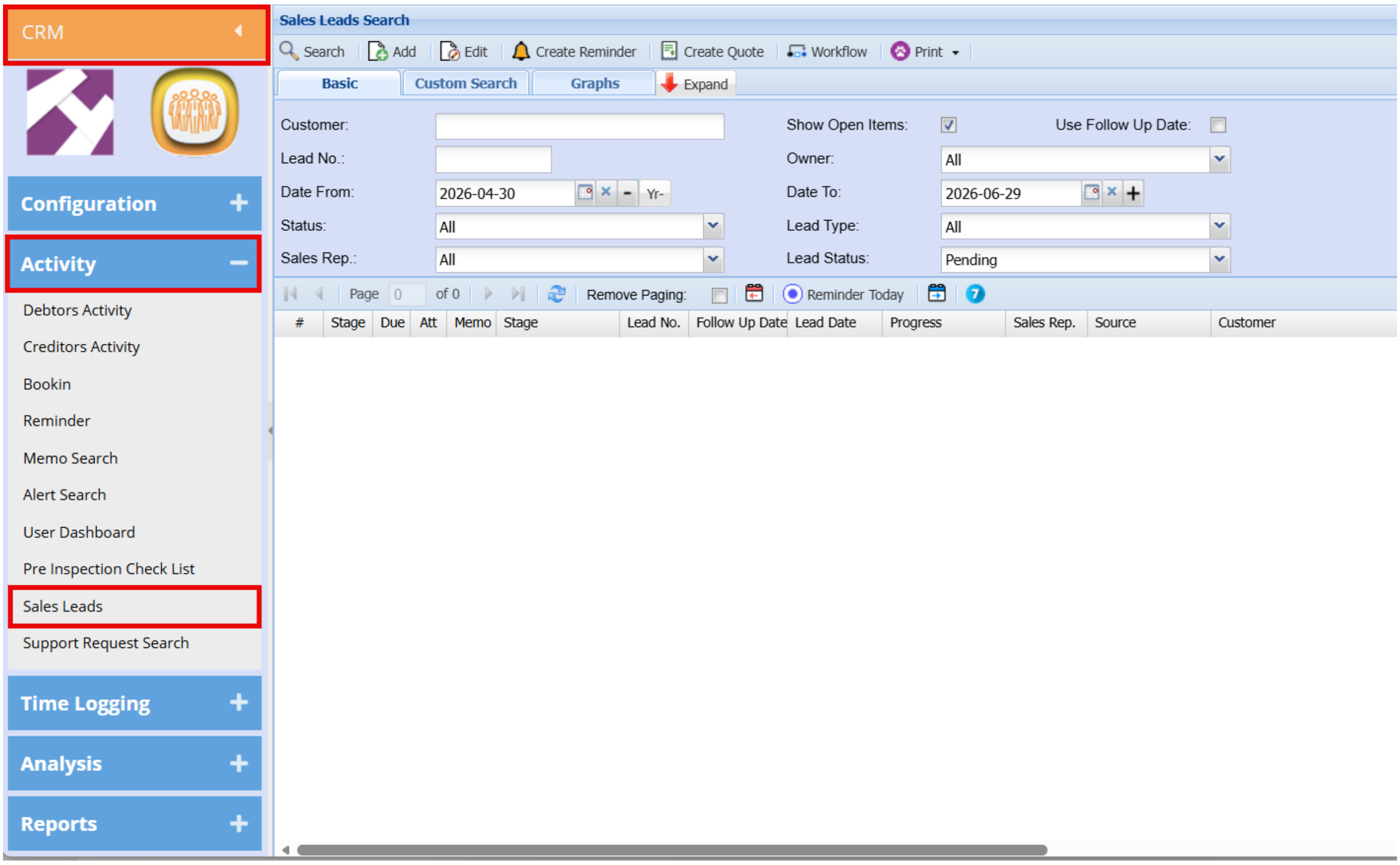
- Sales Leads Search
- Sales lead Process
- Create a Quote From Sales leads
- Sales Leads - Reminder Create
- Sales Leads import export

# Sales Leads Search

The **Sales Leads** screen allows users to create new Sales Leads or search for existing ones.

Video training manual 2016 - [Click Here]

**Webatar > Activity> Sales Leads**




## Search Functionality

The search panel enables users to filter and locate Sales Leads using criteria such as Customer, Lead Number, Date Range, Status, Sales Representative, Owner, and Lead Type.

- Select the desired filters and click **Search** to refine results.
- If no filters are applied, all Sales Leads will be displayed in the grid.

| | |
|---|---|
| **Customer Field** | Searches on the Debtors Code, Debtors Name, email address, telephone number and mobile number fields |

Use the **Expand** button to show additional search filters, or **Contract** to hide them.

## Action Buttons

Located on the top navigation ribbon:

| | |
|---|---|
| **Search** | Runs the search based on selected filters. |
| **Add** | Creates a new Sales Lead. |
| **Edit** | Opens the selected Sales Lead for editing. |
| **Create Reminder** | Sets a reminder linked to a Sales Lead. |
| **Create Quote** | Generates a quote from the selected Sales Lead. |
| **Workflow** | Access workflow-related actions. |
| **Print** | Opens print and export options. |

## Print / Export Options

The **Print** dropdown provides the following:

| | |
|---|---|
| **Export** | Export Sales Leads to an Excel file. |
| **Print Grid** | Print all Sales Leads currently displayed in the grid. |
| **Print Lead Details** | Print details of the selected Sales Lead. |
| **Print Lead Form** | rint a blank Sales Lead form template. |

## Results Grid

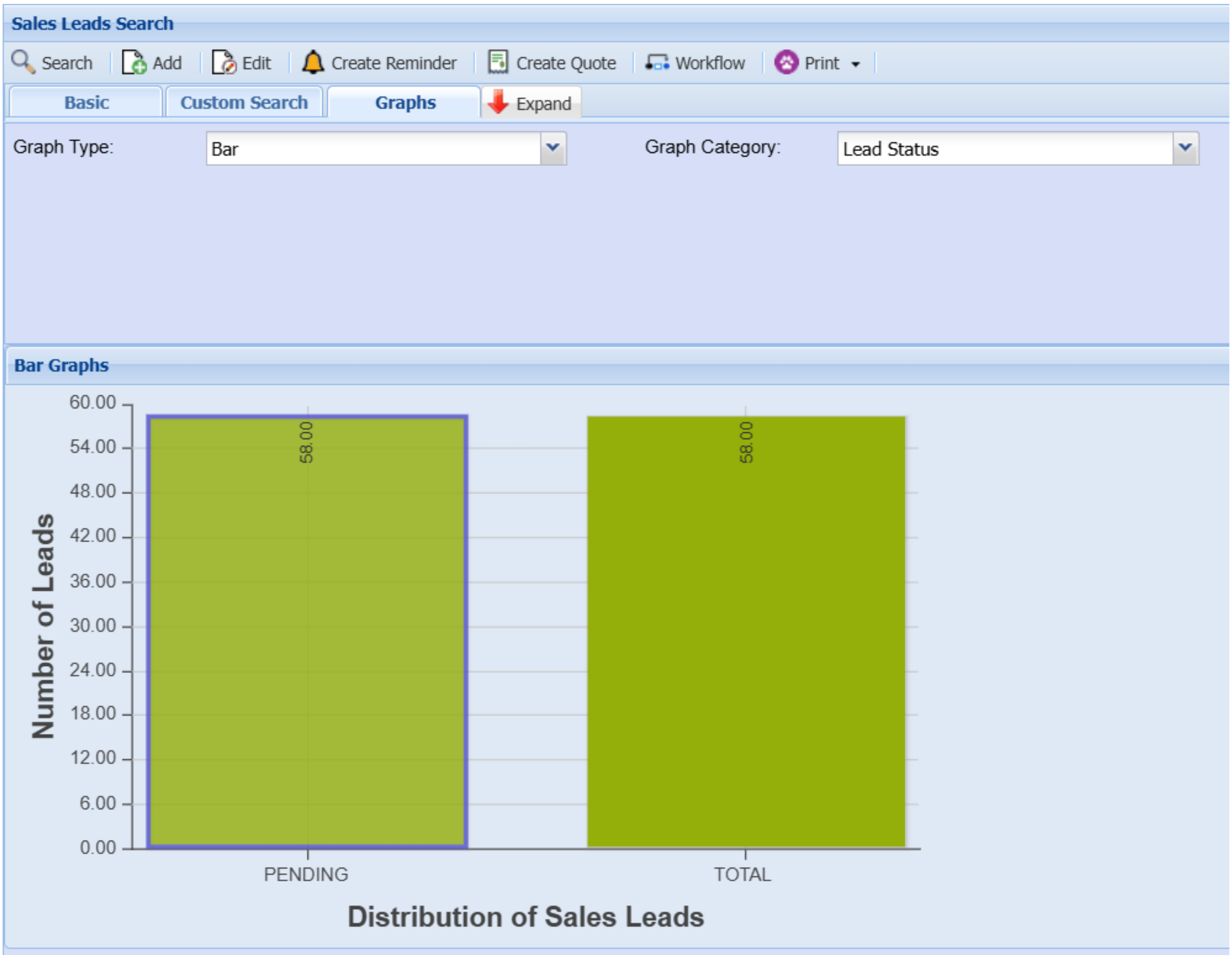
The lower section of the screen displays the results grid, showing all matching Sales Leads with key details such as:

- Stage
- Due Date
- Lead Number
- Follow-Up Date
- Lead Date
- Progress
- Sales Representative
- Source
- Customer

# Graph tab

The **Graphs** tab provides a visual overview of Sales Lead data, allowing users to quickly analyse trends and distributions.

- Change any filter and refresh to update the graph dynamically.
- Use different combinations of **Graph Type** and **Graph Category** to gain deeper insights into Sales Lead activity and trends.
- This feature is useful for monitoring pipeline health, identifying bottlenecks, and supporting reporting.




## Graph Filters

The following fields are available to customise the graph display:

- **Graph Type**
  Select the type of chart to display from the dropdown options (e.g. Bar, Line, Pie). This determines how the data is visually presented.
- **Graph Category**
  Select the data grouping for the graph. For example, choosing *Lead Status* will display leads grouped by their current status (e.g. Pending, Closed).
- **Date From / Date To**
  Define the date range for the data to be included in the graph. Only Sales Leads within

this period will be displayed.

## Graph Display

The graph is shown below the filter section and updates based on the selected criteria.

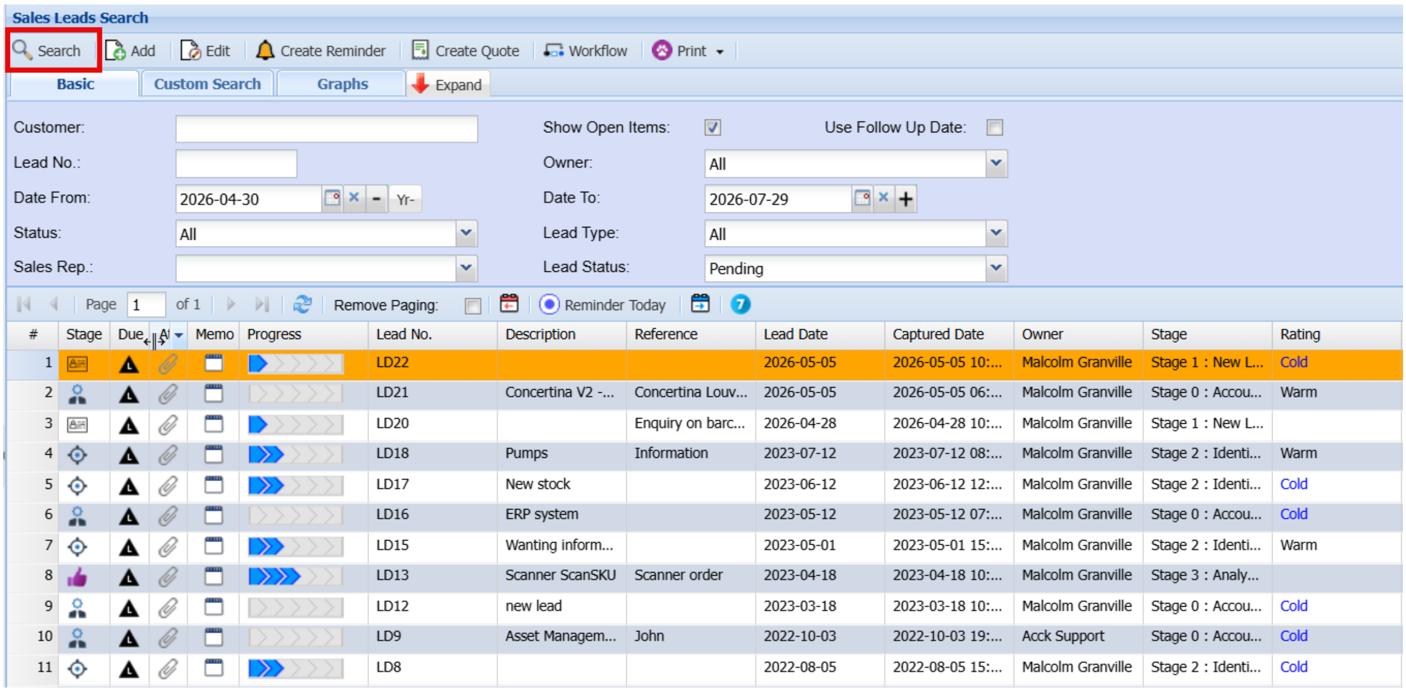
- In the example shown, a **Bar Graph** is used to display the **distribution of Sales Leads by Lead Status**.
- The vertical axis represents the **Number of Leads**, while the horizontal axis shows the selected category (e.g. *Pending*, *Total*).
- Each bar visually represents the volume of leads for that category, making it easy to compare performance at a glance.

# Sales lead Process

**CRM Module> Activity> Sales Leads**

A **Sales Lead** is a person or organisation that has shown interest in purchasing a product or service and has the authority to do so. This represents the first stage of the sales process.

The **Search** button allows you to open and review the details of an existing prospect.

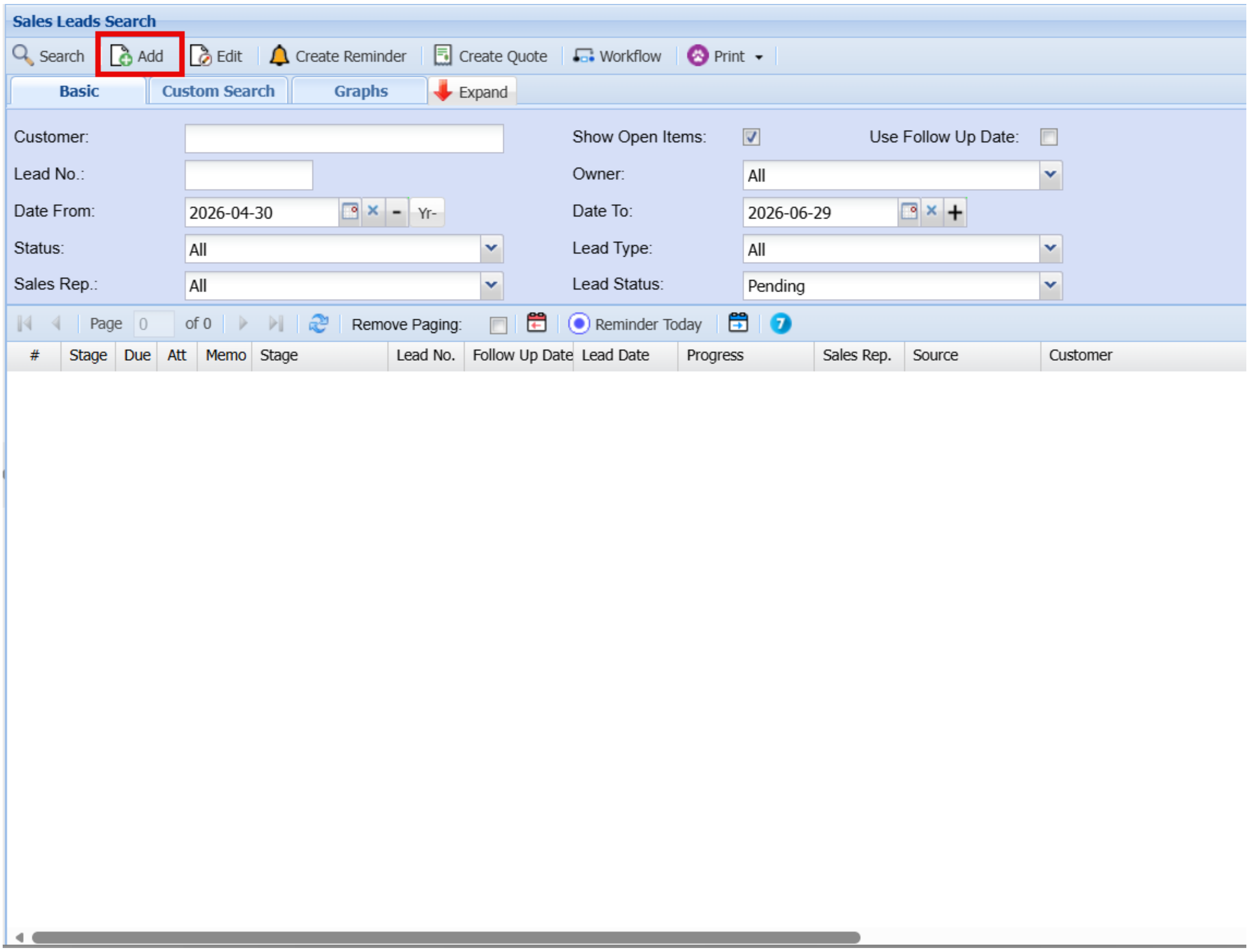



## Creating a new prospect

The **Add Lead** screen is used to capture and manage all relevant information for a new Sales Lead. Below is an explanation of each field and function.

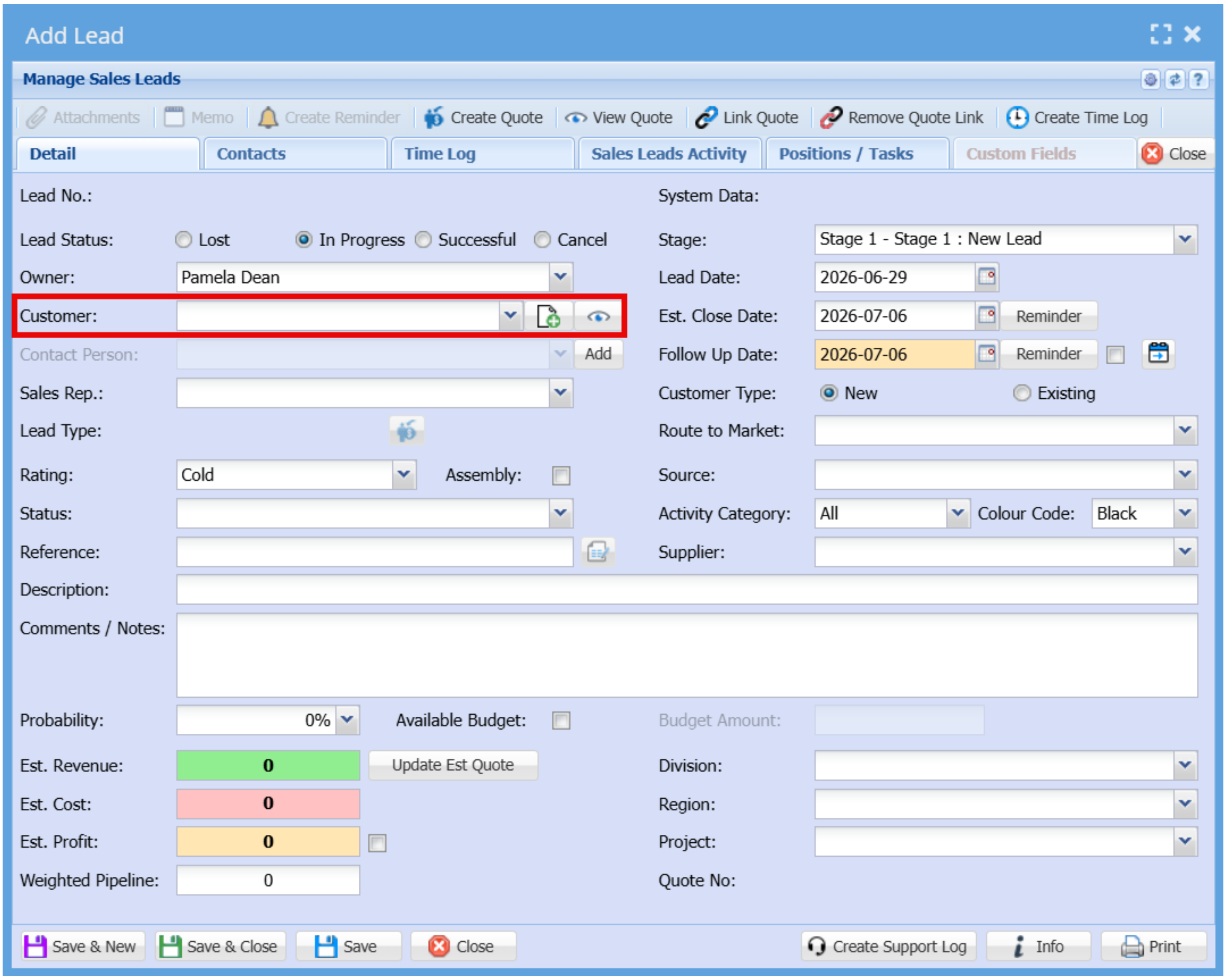
**CRM Module> Activity> Sales Leads**

- Click Add




# Add Sales Lead Screen

If the customer already exists and is interested in additional business, you can either enter their name or select it from the **Customer** dropdown list.




## General Information

| | |
|---|---|
| **Owner** | The person responsible for managing and progressing the lead. |
| **Customer** | The individual or organisation interested in your product or service.<br>• If the customer already exists, select them from the dropdown list.<br>• To create a new customer, click **New**, which opens the Debtors Setup window. Enter the company details and select *Prospect* or *Opportunity* under the Debtor Type. |
| **Contact Person** | Displays or allows selection of the contact linked to the chosen customer. |
| **Sales Rep** | The sales representative responsible for the lead and associated commission. |

## Lead Details

| | |
|---|---|
| **Stage** | Defines the current stage of the lead (e.g. New Lead, Qualified, etc.). |
| **Lead Date** | The date the lead was first identified. |
| **Follow Up Date** | The date scheduled for the next action or follow-up. |
| **Est. Close Date** | The expected date the sale will be finalised. |
| **Customer Type** | Indicates whether the customer is **New** or **Existing**. |
| **Rating** | Classifies the lead as *Hot*, *Warm*, or *Cold* based on likelihood. |
| **Status** | Specifies the current status of the lead (e.g. In Progress, Lost, Successful). |
| **Reference** | Enter any relevant reference number or identifier. |
| **Description** | Provide a brief summary of the opportunity. |
| **Comments / Notes** | Add detailed notes or additional information about the lead. |

## Classification Fields

| | |
|---|---|
| **Route to Market** | Select how the lead was brought in (e.g. direct, partner, online). |
| **Source** | Indicates where the lead originated from. |
| **Activity Category** | Categorises the type of sales activity. |
| **Colour Code** | Assign a colour to visually identify or prioritise the lead. |
| **Division / Region / Project** | Assign organisational structure details for reporting purposes. |

## Financial Information

| | |
|---|---|
| **Probability (%)** | The estimated chance of closing the deal. |
| **Estimated Revenue** | Expected income from the lead. |
| **Estimated Cost** | Anticipated cost associated with fulfilling the sale. |
| **Estimated Profit** | Calculated or entered expected profit. |
| **Weighted Pipeline** | A calculated value based on revenue and probability. |
| **Available Budget** | Indicates if a budget is confirmed and allows entry of the budget amount. |

## Tabs

| | |
|---|---|
| **Contacts Tab** | Displays all contact persons linked to this Sales Lead. |
| **Sales Leads Activity Tab** | Tracks activities related to the lead.<br>• Use the **Edit** button to update existing activity details (e.g. change Activity Category). |

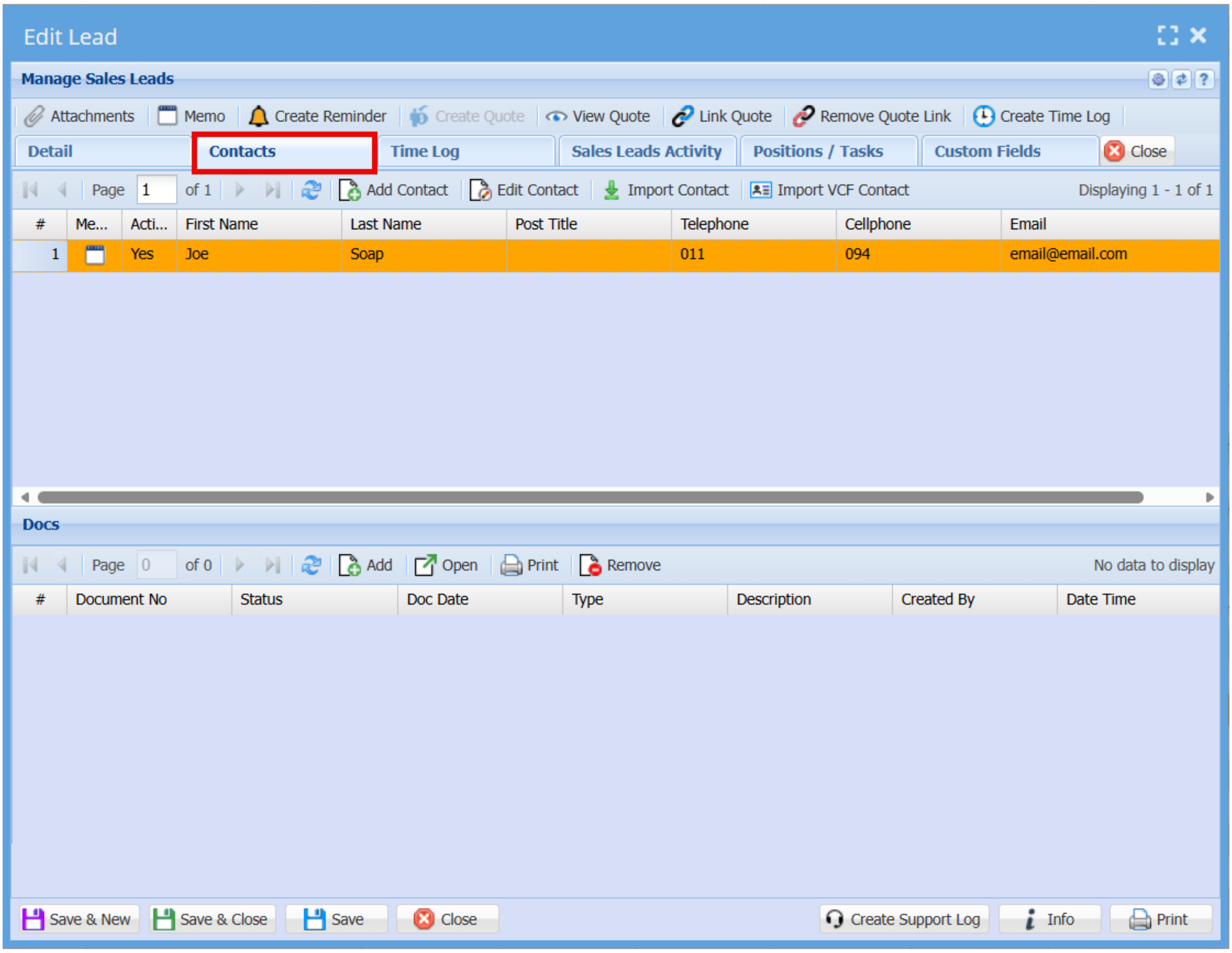
## Action Buttons

| | |
|---|---|
| **Save & New** | Save the current lead and open a new blank form. |
| **Save & Close** | Save the lead and exit the screen. |
| **Save** | Save changes without closing the screen. |
| **Close** | Exit the screen without saving changes. |

# Contacts Tab

The **Contacts** tab within the **Edit Lead** screen displays and manages all contact persons linked to the selected Sales Lead.

- Time logs help monitor effort spent on each Sales Lead and support productivity tracking.
- This feature can also assist with billing where time-based charges apply.
- Keeping time logs updated ensures accurate reporting and accountability.




The grid shows a list of all contacts associated with the lead, including key details such as:

- **First Name and Last Name**
- **Position/Title**
- **Telephone and Cellphone numbers**
- **Email Address**
- **Active status** (indicates whether the contact is currently active)

Each row represents an individual contact linked to the Sales Lead.

## Action Buttons

Located above the contact grid:

- **Add Contact**
  Allows you to create and link a new contact to the Sales Lead.
- **Edit Contact**
  Enables you to update the details of a selected contact.
- **Import Contact**
  Import contact information from an external source.

- **Import VCF Contact**
  Upload and import contacts from a VCF (vCard) file.

## Documents Section (Docs)

The lower section of the screen displays documents linked to the Sales Lead, such as files or attachments.

Available actions include:

- **Add** – Attach a new document
- **Open** – View a selected document
- **Print** – Print the document
- **Remove** – Delete the selected document

If no documents are linked, the grid will display “No data to display.”

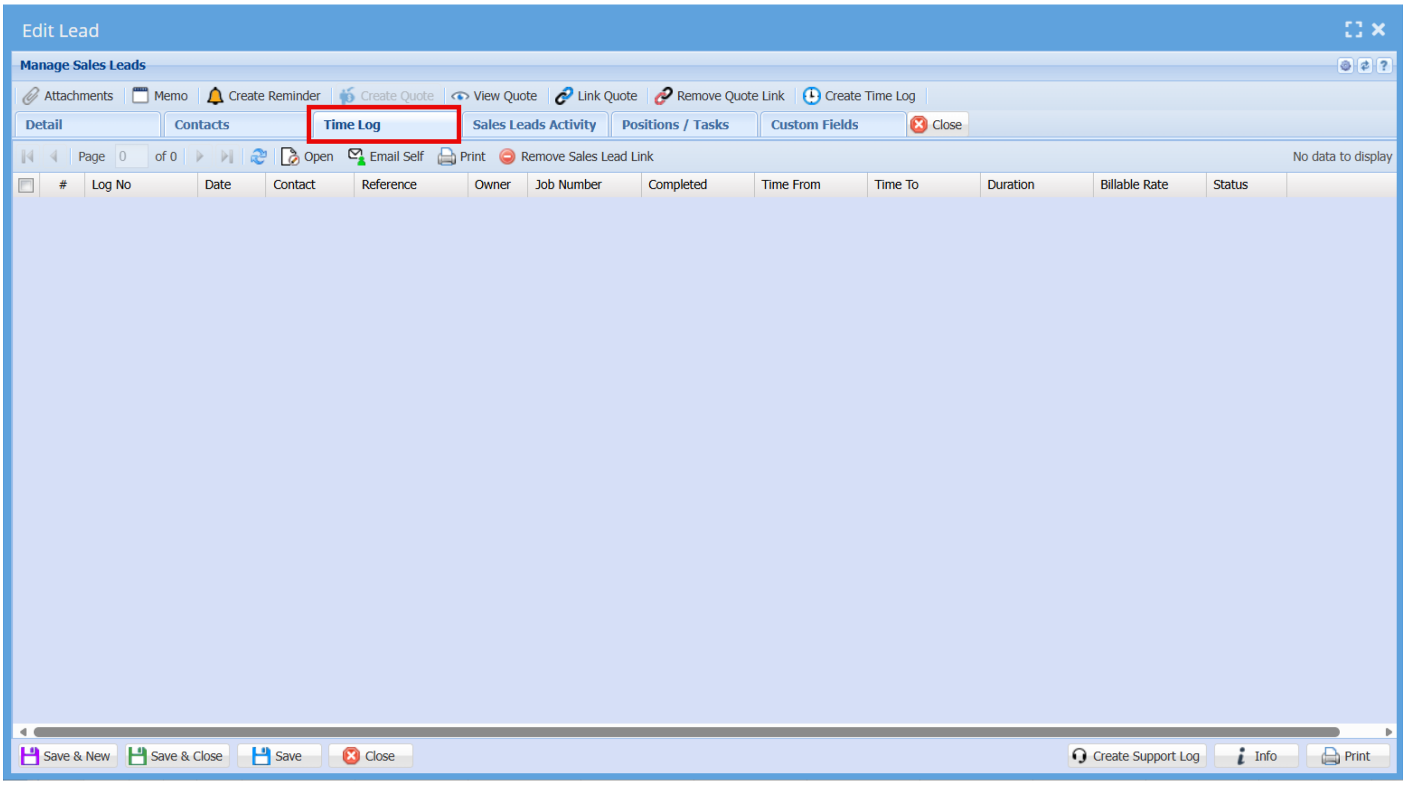
## Additional Notes

- Contacts linked here are directly associated with the selected Sales Lead and can be used for communication and tracking purposes.
- Keeping contact details up to date ensures accurate follow-ups and reporting.

# Time Log

The **Time Log** tab allows users to view and manage time entries linked to the selected Sales Lead. This feature is useful for tracking time spent on activities related to the lead.

- Time logs help monitor effort spent on each Sales Lead and support productivity tracking.
- This feature can also assist with billing where time-based charges apply.
- Keeping time logs updated ensures accurate reporting and accountability.




## Time Log Grid

The grid displays a list of all recorded time entries. Each entry includes the following information:

- **Log No** – Unique reference number for the time entry
- **Date** – The date the activity took place
- **Contact** – The contact person associated with the activity
- **Reference** – Additional reference or description for the entry
- **Owner** – The user who created or is responsible for the time log
- **Job Number** – Linked job or project reference (if applicable)
- **Completed** – Indicates whether the activity has been completed
- **Time From / Time To** – Start and end times of the activity
- **Duration** – Total time spent on the activity
- **Billable Rate** – Rate applied if the time is billable
- **Status** – Current status of the time entry

If no time entries have been recorded, the grid will display **“No data to display.”**

## Action Buttons

Located above the grid, the following options are available:

- **Open**
  View or open the selected time log entry.
- **Email Self**
  Send the time log details to your own email for reference.
- **Print**
  Print the selected time log entry or list.

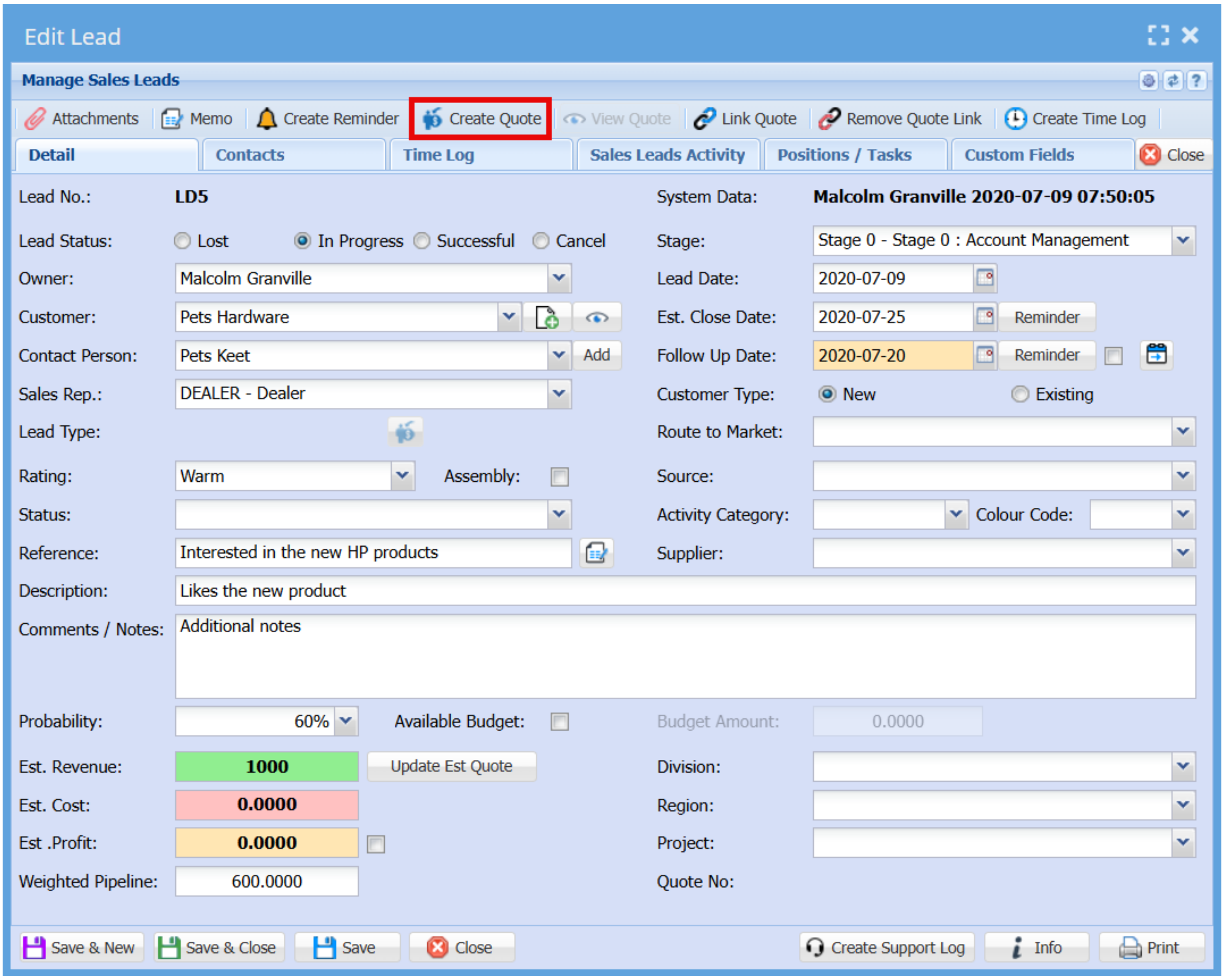
- **Remove Sales Lead Link**
  Unlink the selected time log entry from the Sales Lead.
- **Create Time Log** (available on the top ribbon)
  Create a new time entry linked to the Sales Lead.

# Create a Quote From Sales leads

## Create a quote

The system allows users to generate a **Quote directly from an existing Sales Lead**, helping streamline the sales process and avoid re-entering information.

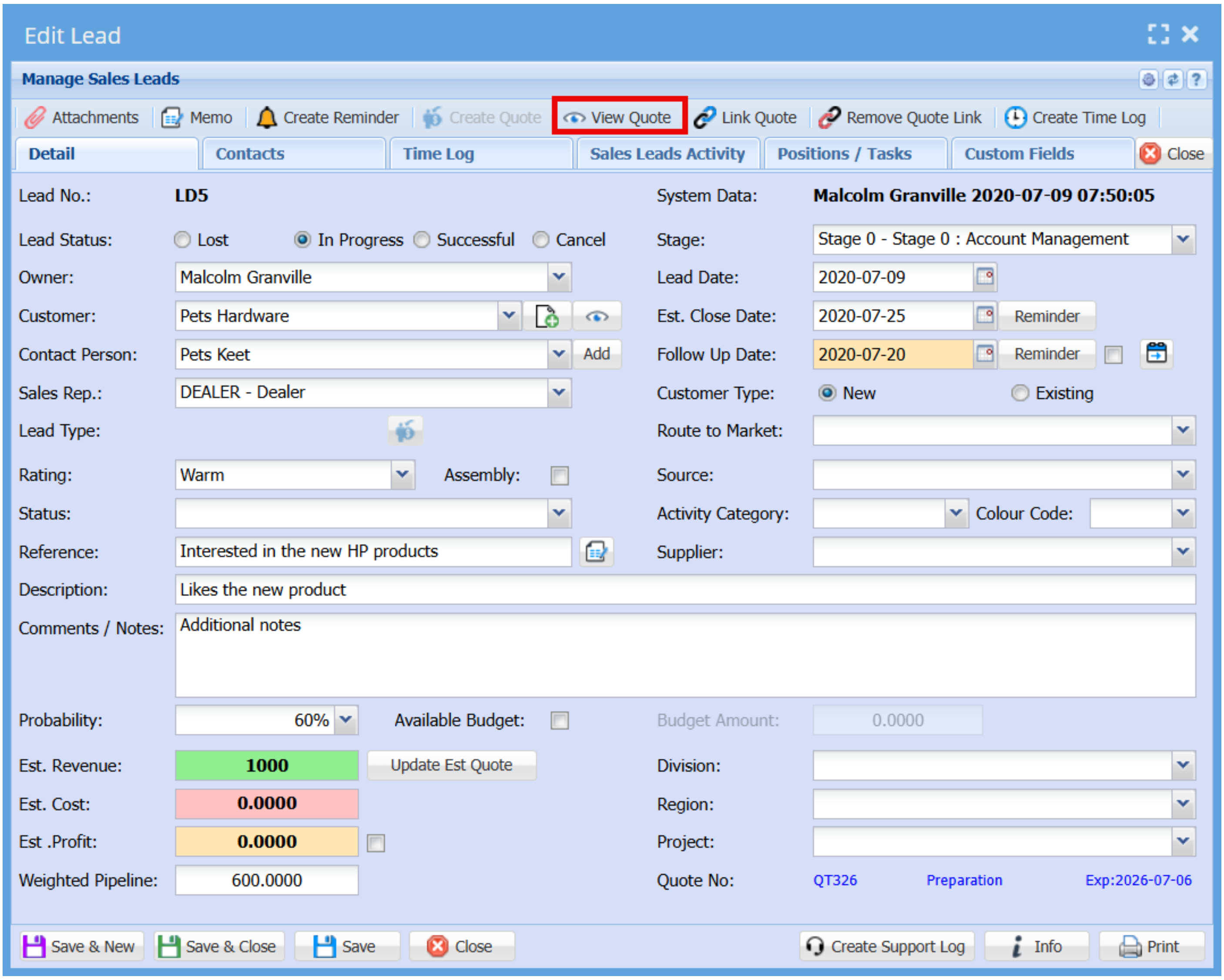
Click on "**Create Quote**" button




## View Quote

Once a quote has been created and linked to a Sales Lead, it can be easily accessed using the "**View Quote"** function.

> Only **one quote** can be linked to a Sales Lead at any given time.

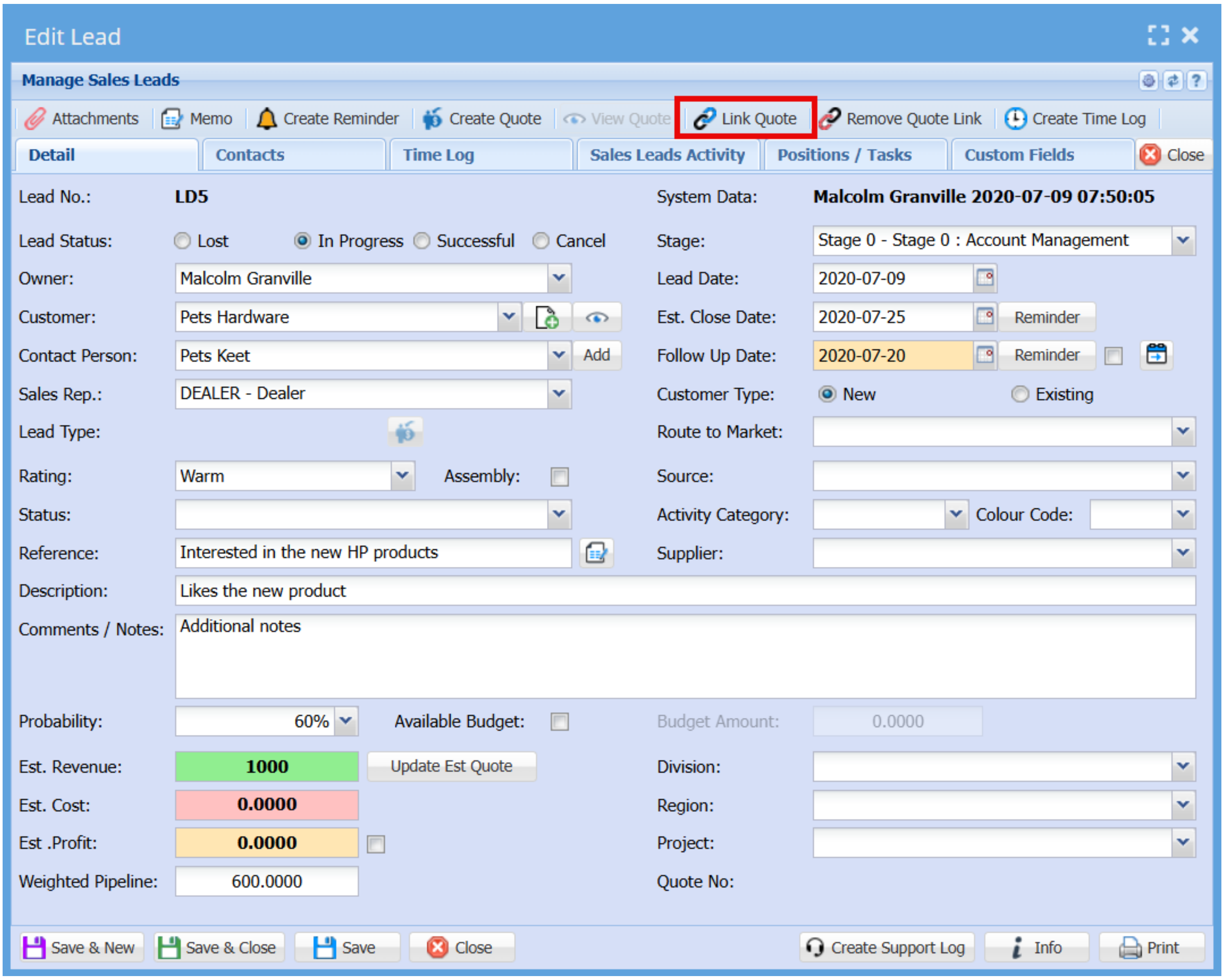



## Link Quote

The **Link Quote** function allows you to connect an existing quote to a Sales Lead after the quote has already been created in the **Debtors module**.

### When to Use Link Quote

- Use this option when a quote was **not created directly from the Sales Lead**.
- For example, if a quote was created separately in the Debtors module, it can still be linked back to the relevant Sales Lead for tracking purposes.




## Remove Quote Link

The **Remove Quote Link** function allows you to disconnect a linked quote from a Sales Lead.

1. Open the **Sales Lead** in **Edit Lead** mode
2. Click the **Remove Quote Link** button on the top navigation ribbon
3. The system will remove the association between the Sales Lead and the quote

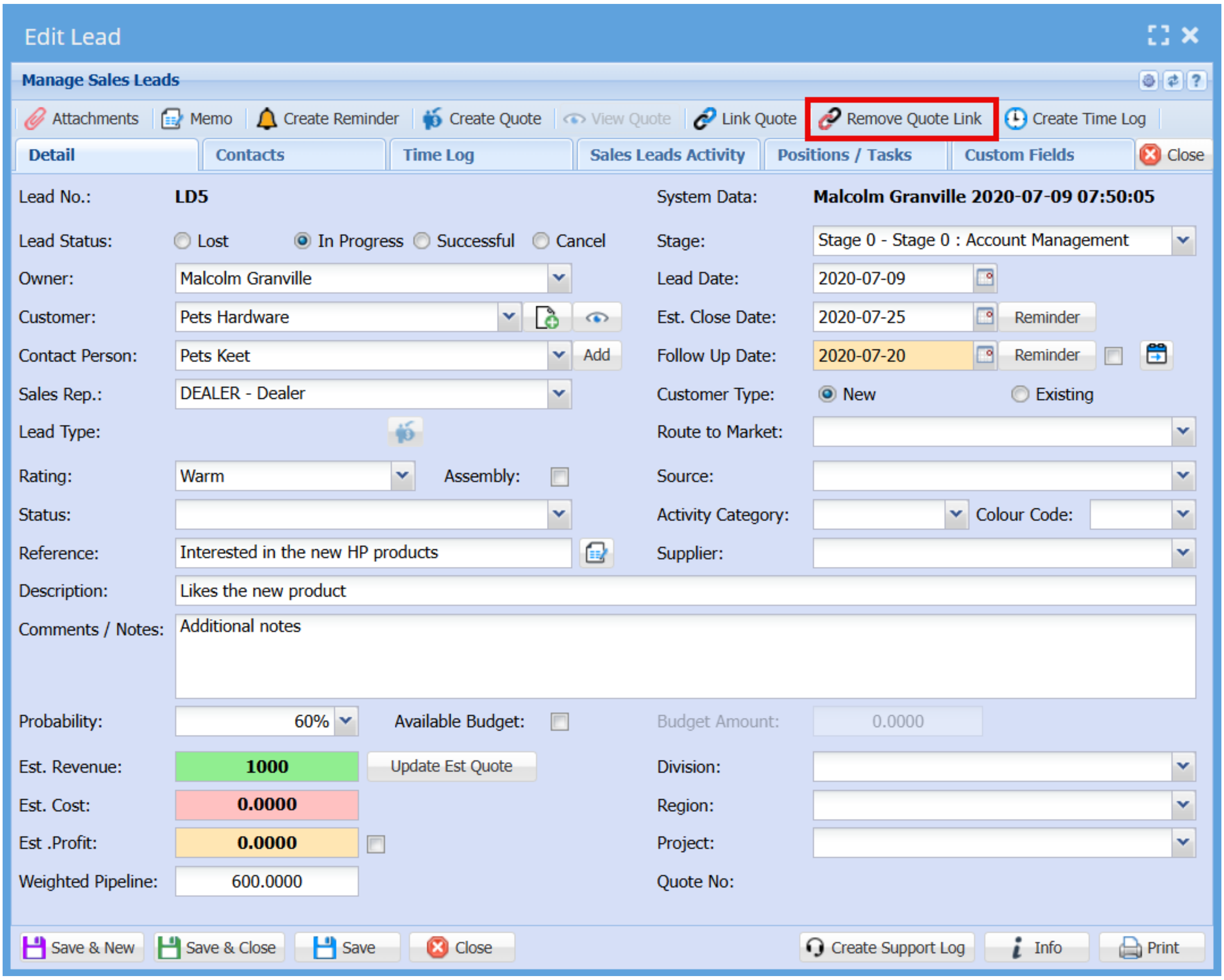
When to Use **Remove** Quote Link

- When the incorrect quote has been linked to the Sales Lead
- When you need to replace the existing quote with a different one
- When the quote is no longer relevant to the Sales Lead

**Important Notes**

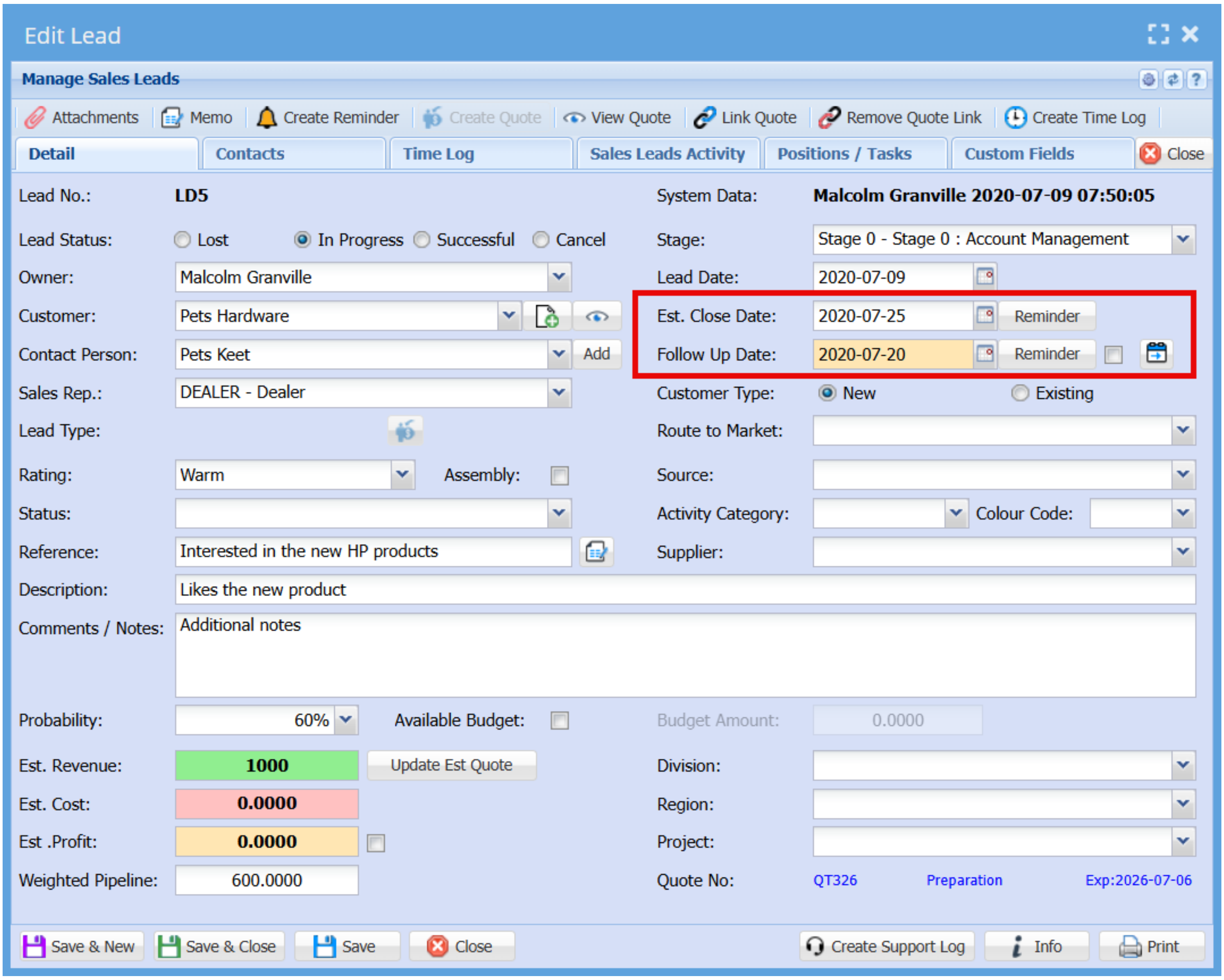
- Removing the link **does not delete the quote** from the system

- The quote remains available in the **Debtors module** and can be reused or linked to another Sales Lead if required
- Only the connection between the Sales Lead and the quote is removed



# Sales Leads - Reminder Create

This section of the **Edit Lead** screen controls key date fields and reminder functionality for managing follow-ups and expected closure.




## Field Layout & Display

- The **date fields are reduced in size** to improve screen layout and usability.
- The **Follow Up Date** is positioned **below the Estimated Close Date** (swapped from the original layout).
- The **Follow Up Date field is highlighted with a cream background**, making it easily identifiable as a priority action item.

## Reminder Buttons

- A **Reminder button** is available next to both:
  - **Estimated Close Date**

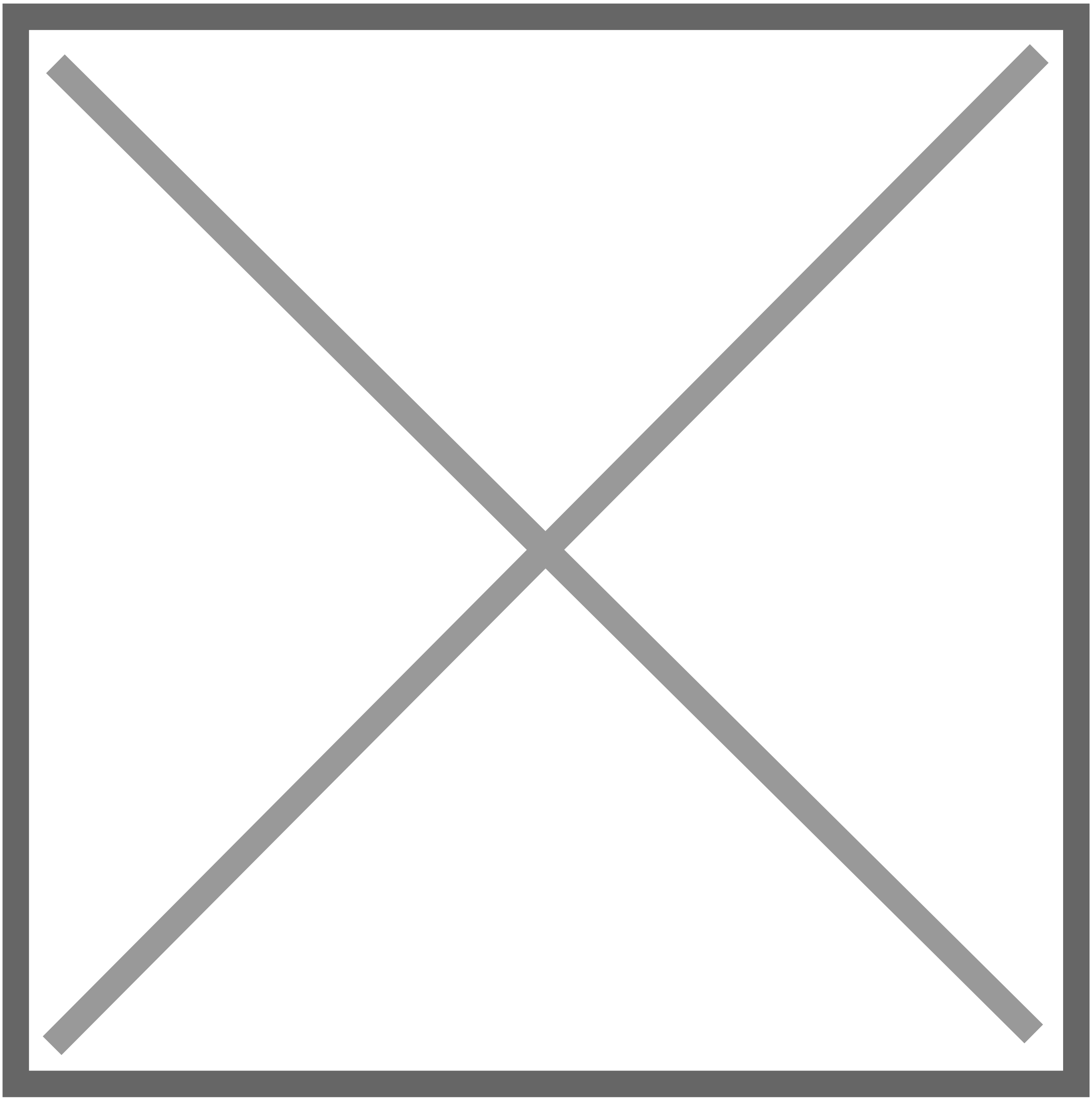
    - **Follow Up Date**
- These buttons allow users to manually create or view reminders linked to each date.

## Follow Up Reminder Tick Box

A **tick box** is located next to the **Follow Up Date** field, controlling automatic reminder creation.

# Behaviour:

- **When adding a new Sales Lead**
    - The tick box is **selected (on) by default**.
- **When editing an existing Sales Lead**
    - The tick box is **unselected (off) by default**.
- **When saving the lead (Save or Save & Close)**
    - If the tick box is **selected**, a reminder is **automatically created** based on the Follow Up Date.
- **If the Follow Up Date is changed**
    - The user must **re-select (tick) the box** to confirm a new reminder should be created.
- **When saving again with the tick box selected**
    - A **new reminder is created** using the updated Follow Up Date.



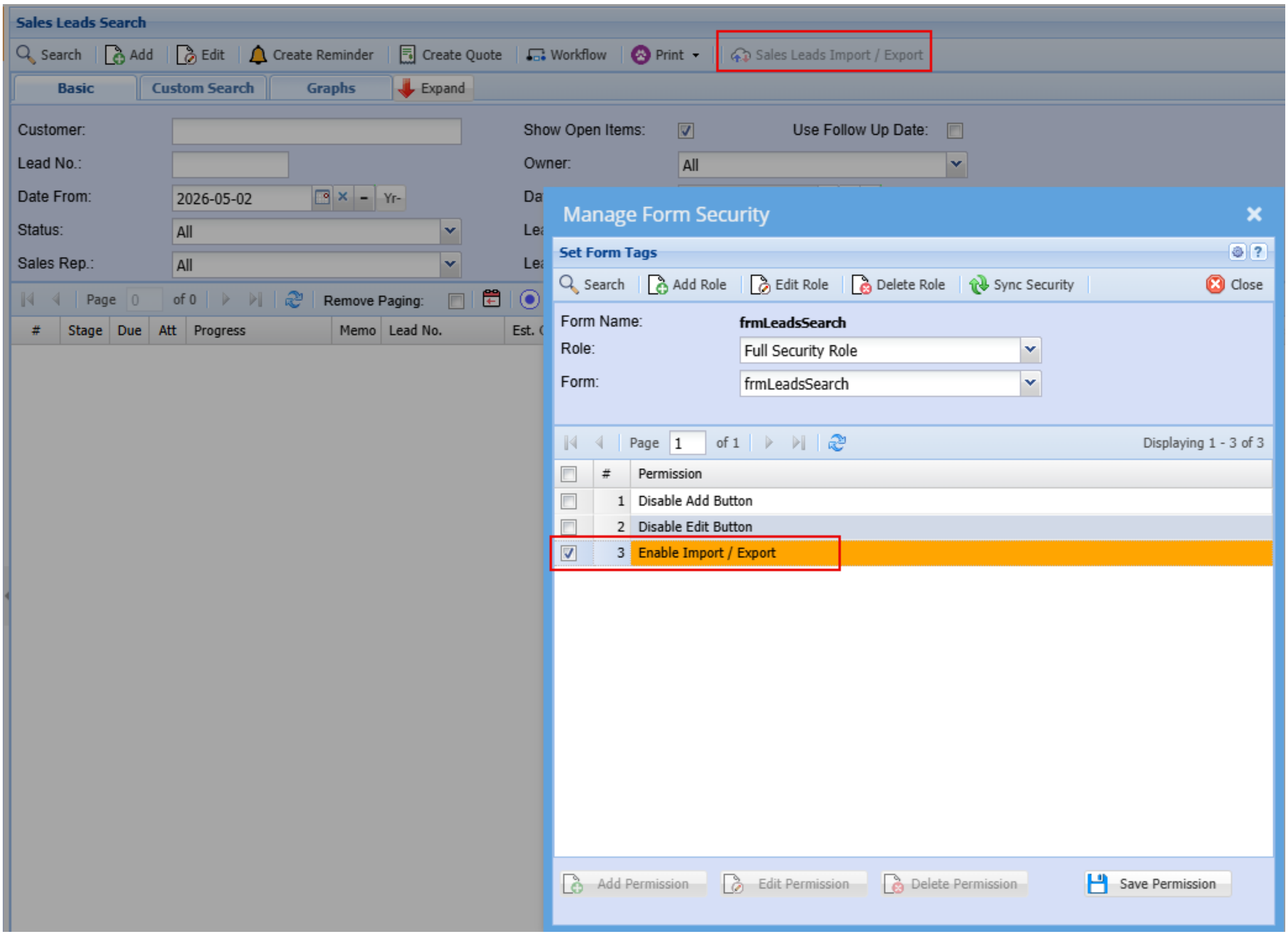
# Sales Leads import export

This feature allows for exporting and importing of sales leads.

It can be used to import new leads or update existing leads.

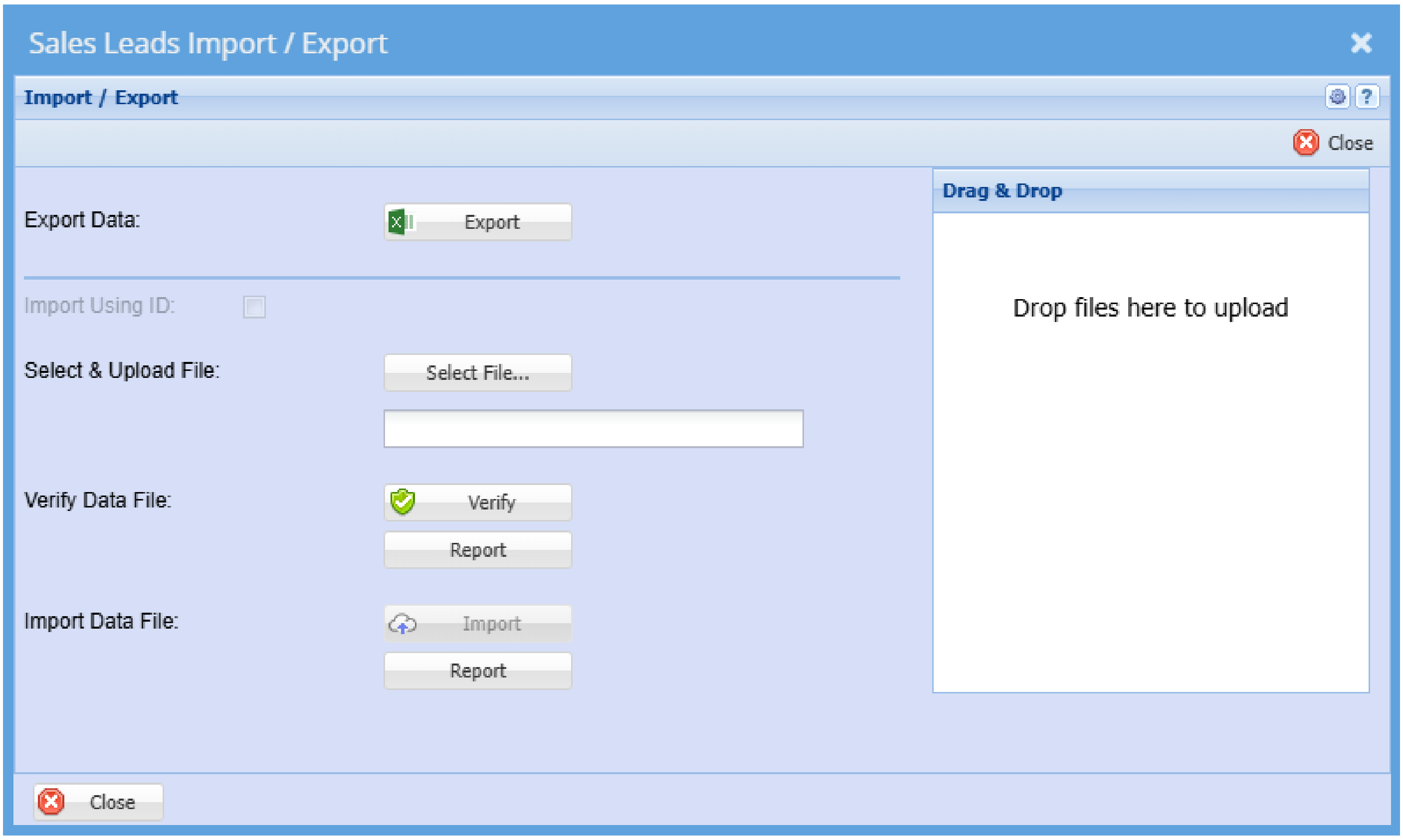
Sales leads import export function is disabled by default.

Enable via Form security



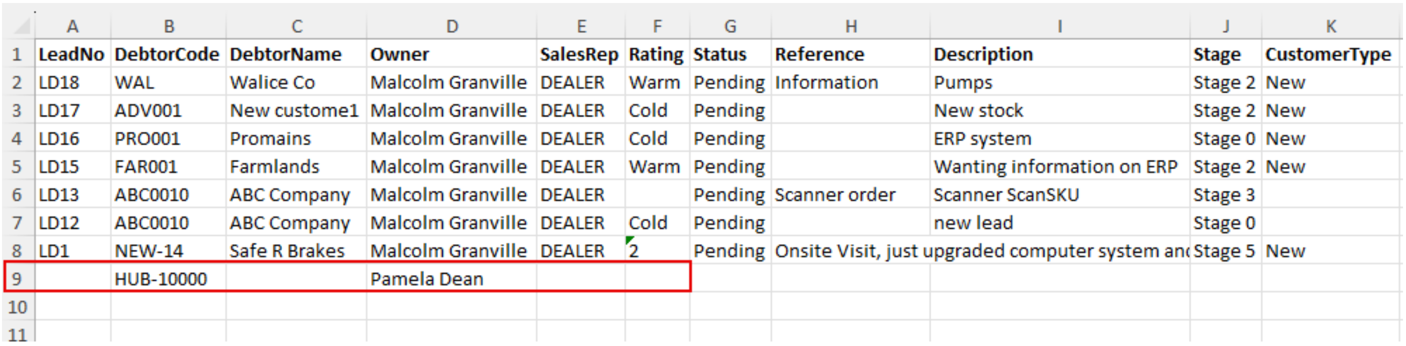

## Export the data based on the search

This will give you the template layout as well as the data




## Exported Data

To add a new Sales, leave the Lead number blank and enter the DebtorCode



| | A | B | C | D | E | F | G | H | I | J | K |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | LeadNo | DebtorCode | DebtorName | Owner | SalesRep | Rating | Status | Reference | Description | Stage | CustomerType |
| 2 | LD18 | WAL | Walice Co | Malcolm Granville | DEALER | Warm | Pending | Information | Pumps | Stage 2 | New |
| 3 | LD17 | ADV001 | New custome1 | Malcolm Granville | DEALER | Cold | Pending | | New stock | Stage 2 | New |
| 4 | LD16 | PRO001 | Promains | Malcolm Granville | DEALER | Cold | Pending | | ERP system | Stage 0 | New |
| 5 | LD15 | FAR001 | Farmlands | Malcolm Granville | DEALER | Warm | Pending | | Wanting information on ERP | Stage 2 | New |
| 6 | LD13 | ABC0010 | ABC Company | Malcolm Granville | DEALER | | Pending | Scanner order | Scanner ScanSKU | Stage 3 | |
| 7 | LD12 | ABC0010 | ABC Company | Malcolm Granville | DEALER | Cold | Pending | | new lead | Stage 0 | |
| 8 | LD1 | NEW-14 | Safe R Brakes | Malcolm Granville | DEALER | 2 | Pending | Onsite Visit, just upgraded computer system an | | Stage 5 | New |
| 9 | | HUB-10000 | | Pamela Dean | | | | | | | |
| 10 | | | | | | | | | | | |
| 11 | | | | | | | | | | | |

These fields will auto populate if you don't fill them in

| **Field** | **Default setting** | **Can set to** |
|---|---|---|
| **Contact Person** | default contact person of setup | N/A |
| **Lead Status** | In Progress | N/A |
| **Sale Rep** | default to the prospect or customer setup.  If none, leave blank | Sales Rep code |
| **Rating** | Cold | Cold, Warm or Hot |
| **Probability** | 0% | 10, 20, 30 etc |
| **Stage** | First one on the list - Stage0 | Stage codes |
| **Est Close Date** | 7 days from Imported date | N/A |

| | | |
|---|---|---|
| **Follow up date** | same as Est close date | N/A |
| **Customer Type** | New | New or Existing |
| **Division** | Default to customer setup | Division Code |
| **Region** | Default to customer setup | Region Code |