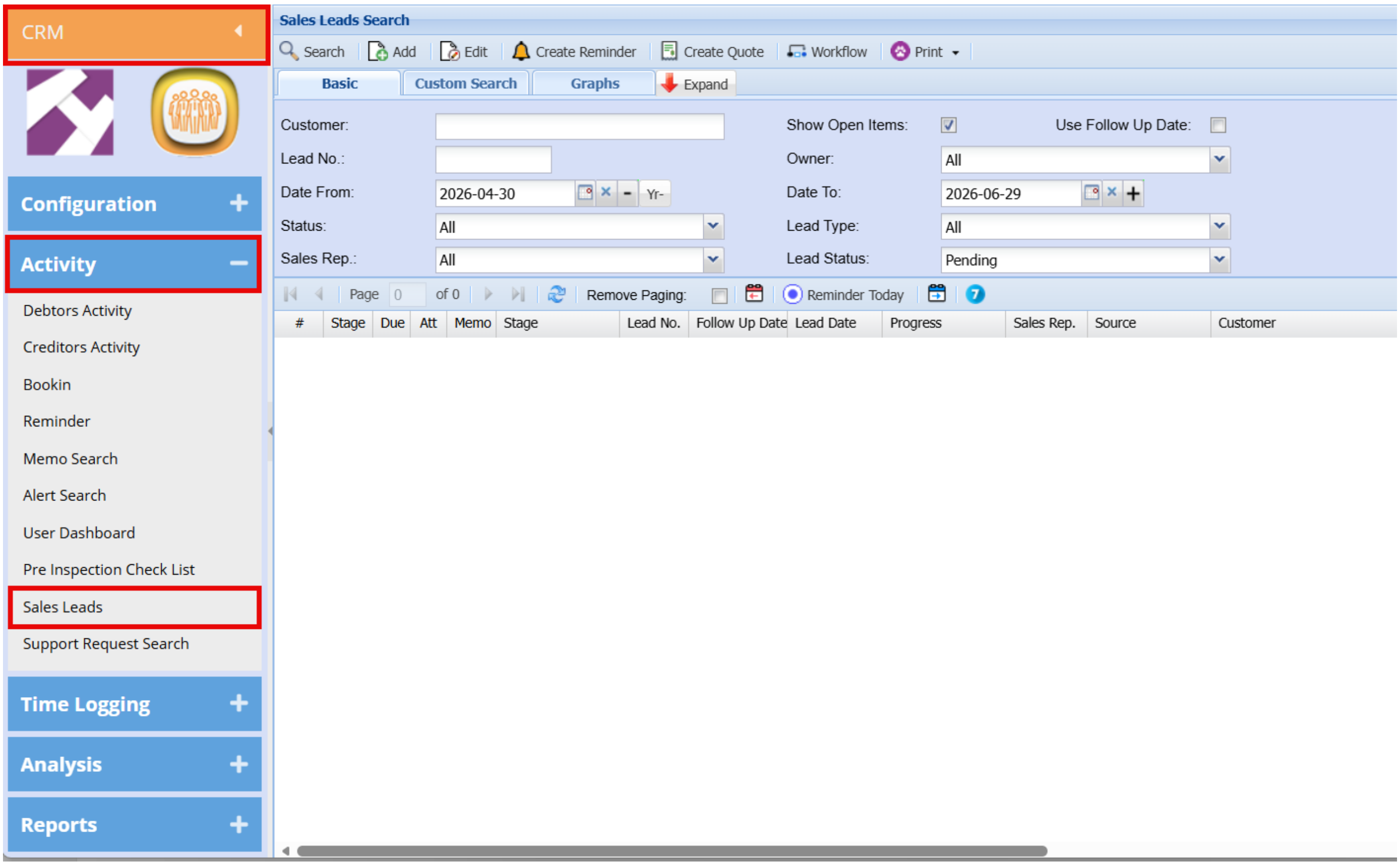
Sales Leads Search

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

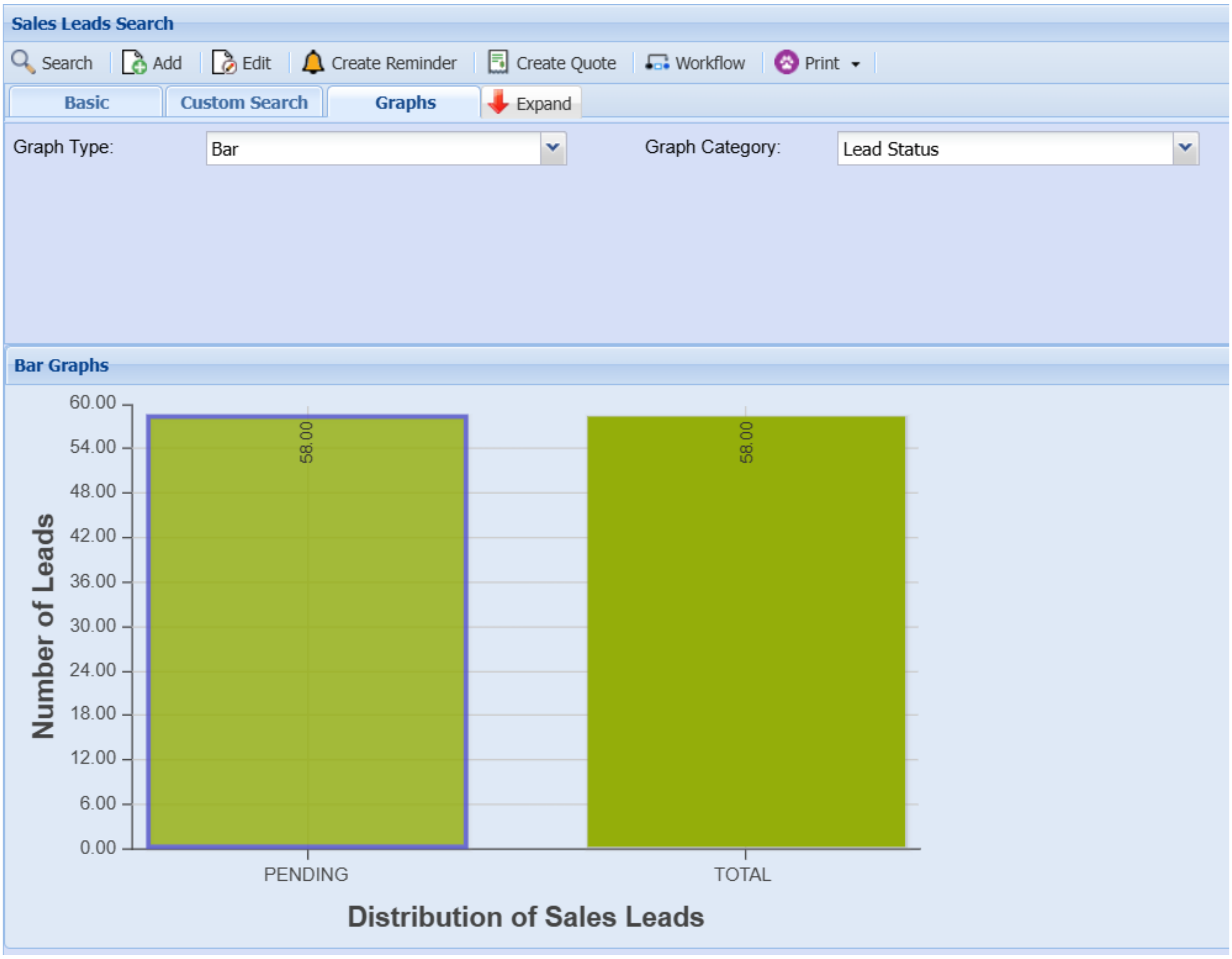
The lower section of the screen displays the results grid, showing all matching Sales Leads with key details such as:

- 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.

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