

My Leads

The **My Leads** module is a centralized hub where you can manage all your leads. After creating a lead and assigning it to a specific individual, it is sorted into one of several tabs based on its state. If no state is selected during lead creation, the lead is automatically placed in the **Fresh Leads** tab.

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My Leads

Overview

My Leads is your personal workspace in the CRM. It shows all leads currently assigned to you, organized into tabs based on their state.

If you are a **manager**, you can also see leads assigned to your team members based on the hierarchy tree.

Lead Tabs

Tab	Description
Favorite	Leads you marked as favorite for quick access. Cannot be deleted.
Fresh Leads	Newly assigned leads with no state selected yet. Cannot be deleted.
VIP / Urgent	High-priority leads requiring immediate attention.
Pending	Leads awaiting a response or next step.
Following	Leads being actively followed up.
Planned Meeting	Leads with an upcoming planned meeting.
Meeting	Leads currently in or recently had a meeting.
After Meeting	Leads in the follow-up stage after a meeting.
Not Interested	Leads that showed no interest.
Unreachable	Leads that cannot be contacted.
Done Deal	Leads successfully converted to a sale or reservation.
Cancelled	Leads where the deal or interaction was cancelled.
Low Budget	Leads whose budget doesn't match available offerings.
All Leads	Full view of all your leads regardless of state. Cannot be deleted.

How States Work

- When you update a lead, you select a **state** from the dropdown.
 - The lead automatically moves to the matching tab.
 - If **no state** is selected when assigning, the lead goes to **Fresh Leads**.
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Visibility Based on Hierarchy

- **Managers** see leads for themselves and all users under them in the tree.
 - **Regular salesmen** see only their own leads.
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Common Features Across All Tabs

Every tab has the same top bar with:

- **Search bar** — find a lead by name, mobile, or email.
 - **Bulk State Move** — change the state of multiple leads at once.
 - **Export** — download the lead list.
 - **Show Delayed Leads** — filter overdue leads (*not available in Fresh Leads tab*).
 - **Sorting options:**
 - Old to Recent by Next Action
 - Recent to Old by Next Action
 - Old to Recent by Created Date
 - Recent to Old by Created Date
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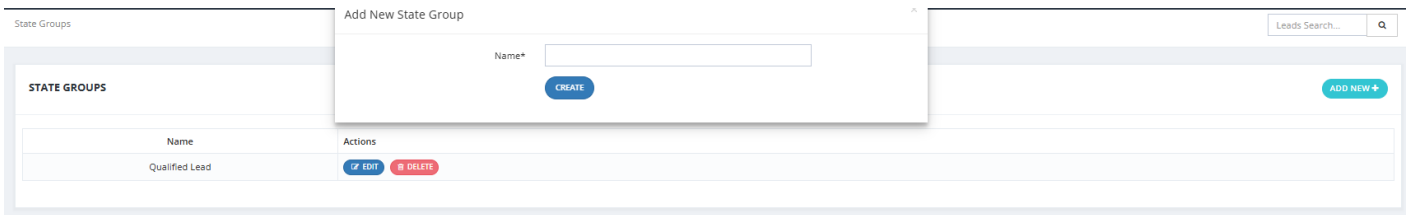
Tab Management

- You can **delete** any tab except Favorite, Fresh Leads, and All Leads.
- Custom states can be added via **Setup** → **List Setup** → **Add New State**.
- Select State Group

Name	Group	Icon	Color	Actions
Following	Qualified Lead	📄	🟠	EDIT TRANSLATE TO العربية DELETE
Planned-Meeting	N/A	📅	🟠	EDIT TRANSLATE TO العربية DELETE
Meeting	Qualified Lead	🗨️	🟠	EDIT TRANSLATE TO العربية DELETE
Not-Interested	N/A	🚫	🟠	EDIT TRANSLATE TO العربية DELETE
Done-deal	N/A	📄	🟠	EDIT TRANSLATE TO العربية DELETE
Cancelled	N/A	✖️	🔴	EDIT TRANSLATE TO العربية DELETE
Pending	N/A	📄	🔴	EDIT TRANSLATE TO العربية DELETE
Unreachable	N/A	📄	🟤	EDIT TRANSLATE TO العربية DELETE
After Meeting	N/A	📄	🔴	EDIT TRANSLATE TO العربية DELETE
low budget	N/A	📄	🟠	EDIT TRANSLATE TO العربية DELETE

Creat State Group

- **Setup → State Group → Add New.**



Available Filter Options (All Tabs)

You can filter leads within any tab using the following fields:

Filter	Description
Lead Code	A unique identifier for each lead.
Salesman	Filters by the assigned salesman.
Assigned From	Filters by who the lead was assigned from.
Teams	Filters leads associated with specific teams.
Creator	The user who originally created the lead.
Country	Filters based on phone number country code.
Lead Origin	Where the lead came from (e.g., Add New, Upload, Facebook).
Stage	Filters by current reservation/sales stage.
Campaigns	Filters leads linked to specific marketing campaigns.
Sources	Filters by lead source (e.g., WhatsApp, Facebook).
Leads ID	Filters based on specific marketing info / Lead ID.

Filter	Description
Lead Types	Filters by lead type (e.g., Lead, Broker Lead, Broker Request, CIL).
Branches	Filters leads associated with specific company branches.
Broker	Filters leads linked to specific brokers.
Broker Agents	Filters by agents working under a broker.
Projects	Filters leads associated with specific projects.
Broker Projects	Filters leads linked to broker-specific projects.
Tag	Filters by tags or labels applied to the lead.
Age	Filters by age or age group, if collected.
Purpose	Filters by the lead's stated purpose.
Segment	Filters by market segment or demographic group.
Gender	Filters by gender, if collected.
Contact Tools	Filters by contact method used (e.g., phone, email, WhatsApp).
Reply Option	Filters by the lead's preferred reply method.
Assignment Type	Filters by how the lead was assigned.
Budget	Filters by the lead's budget range.
Date Request was created	Filter by lead creation date (From / To).
Date action was created	Filter by when an action was logged (From / To).
Date action is taking place	Filter by the scheduled action date (From / To).
Assignment Date	Filter by when the lead was assigned (From / To).
Duplication Date	Filter by when a duplication was detected (From / To).

Lead Action Filter

Overview

The **Lead Action Filter** is a monitoring tool that lets managers track what actions their salesmen are taking on leads — who did what, when, and how many actions were completed.

LEADS

Total Number Of Leads : 526

Total Number Of Actions : 3871

Search...

SORTING MET

Leads	Actions
<p>Name : sssssssssss Mobile : 201068668504 Email : mNEOfCw49H@nomail.com.com Lead Salesman : Admin Lead Creator : Admin Lead ID : zzzz Created At : 2026-06-28 11:16 AM Current State : Fresh Current Note : by Admin</p>	<p>Action : assign Action Creator : Admin Assigned To : Admin Info : by Admin Date action was created : 2026-06-28 11:16:08</p> <p><input type="button" value="HISTORY"/></p>
<p>Name : sssssssssss Mobile : 201068668504 Email : mNEOfCw49H@nomail.com.com Lead Salesman : Admin Lead Creator : Admin Lead ID : zzzz Created At : 2026-06-28 11:16 AM Current State : Fresh Current Note : by Admin</p>	<p>Action : created Action Creator : Admin Info : created by Admin Date action was created : 2026-06-28 11:16:07</p> <p><input type="button" value="HISTORY"/></p>
<p>Name : oooooooooo Mobile : 201068668511 Email : SVTFcsQLPB@nomail.com.org Lead Salesman : Admin Lead Creator : Admin Lead ID : QR Created At : 2026-06-27 16:56 PM Current State : Fresh Current Note : (mobile) Additional Field with value (201068668504) was deleted by Admin</p>	<p>Action : delete Action Creator : Admin Info : (mobile) Additional Field with value (201068668504) was deleted by Admin Date action was created : 2026-06-27 16:57:29</p> <p><input type="button" value="HISTORY"/></p>
<p>Name : oooooooooo Mobile : 201068668511 Email : SVTFcsQLPB@nomail.com.org Lead Salesman : Admin Lead Creator : Admin Lead ID : QR Created At : 2026-06-27 16:56 PM Current State : Fresh Current Note : (mobile) Additional Field with value (201068668504) was deleted by Admin</p>	<p>Action : Update Info Action Creator : Admin Info : Update Info with new values (201068668511) Date action was created : 2026-06-27 16:57:12</p> <p><input type="button" value="HISTORY"/></p>

What It Shows

- **Total number of leads** in the system.
- **Total number of actions** taken across all leads.
- A detailed list of each lead with:
 - Lead name, mobile, email
 - Assigned salesman
 - Lead creator
 - Created date
 - Current state
 - Action taken (e.g., WhatsApp, Call, Check-in)
 - Who performed the action
 - When the action was done

How to Use It

1. Go to **Sales Module** → **My Leads** → **Lead Action Filter**.
 2. Apply filters to narrow down results by salesman, date range, action type, or state.
 3. Review the action log.
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Key Insight — Actions vs Leads Count

“ The number of **actions** can be higher or lower than the number of **leads**.

- A salesman with 5 leads but 10 actions has been actively following up.
- A salesman with 5 leads but 0 actions has not contacted any leads yet.
- If a lead shows in **All Leads** but not here, it may have been **deleted/moved to trash**.

Available Filter Options

Filter	Description
Creator	The user who created the lead.
Current Salesman	The salesman currently assigned to the lead.
Affected Salesman	The salesman affected by the action.
Assigned From	Who the lead was assigned from.
Actions	Filter by specific action type (e.g., call, WhatsApp, check-in).
Tag	Filter by tags applied to the lead.

Filter	Description
Leads Creator	The original creator of the lead.
Lead ID	Filter by specific marketing info / Lead ID.
Sources	Filter by lead source.
Lead Types	Filter by lead type.
Reply State	Filter by the reply status of the action.
Broker	Filter by broker linked to the lead.
Broker Agents	Filter by broker agent.
Assignment Type	Filter by how the lead was assigned.
State	Filter by current lead state.
Lead Origin	Filter by where the lead came from.
Date Request was created	Filter by lead creation date (From / To).
Date action was created	Filter by when the action was logged (From / To).
Date action is taking place	Filter by the scheduled action date (From / To).
Assignment Date	Filter by when the lead was assigned (From / To).

Filters ▼

Actions creator	NONE SELECTED ▼	Current Salesman	NONE SELECTED ▼	Affected Salesman	NONE SELECTED ▼	Assigned From	NONE SELECTED ▼
Actions	NONE SELECTED ▼	Tag	SELECT TAG ▼	Leads creator	NONE SELECTED ▼	LeadID	NONE SELECTED ▼
Sources	NONE SELECTED ▼	Lead Types	NONE SELECTED ▼	Reply State	NONE SELECTED ▼	Broker	NONE SELECTED ▼
Broker Agents	NONE SELECTED ▼	Assignment Type	NONE SELECTED ▼	State	NONE SELECTED ▼	Lead Origin	NONE SELECTED ▼
Date Request was created		Date action was created		Date action is taking place		Assignment Date	
From		From		From		From	
To		To		To		To	

FILTER
RESET FILTER

Available Options

- **Sort** by different criteria to organize the action log.
 - **Export** the action report for external use or reporting.
 - **History** button on each lead — shows the full interaction log for that specific lead.
 - **Search bar** — find specific leads or actions quickly.
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Key Things to Know

- This tab is primarily used by **managers and team leaders** for performance monitoring.
- It is useful for identifying inactive leads or salesmen who haven't logged any actions.
- Use it alongside the **Dashboard** for a full picture of team performance.