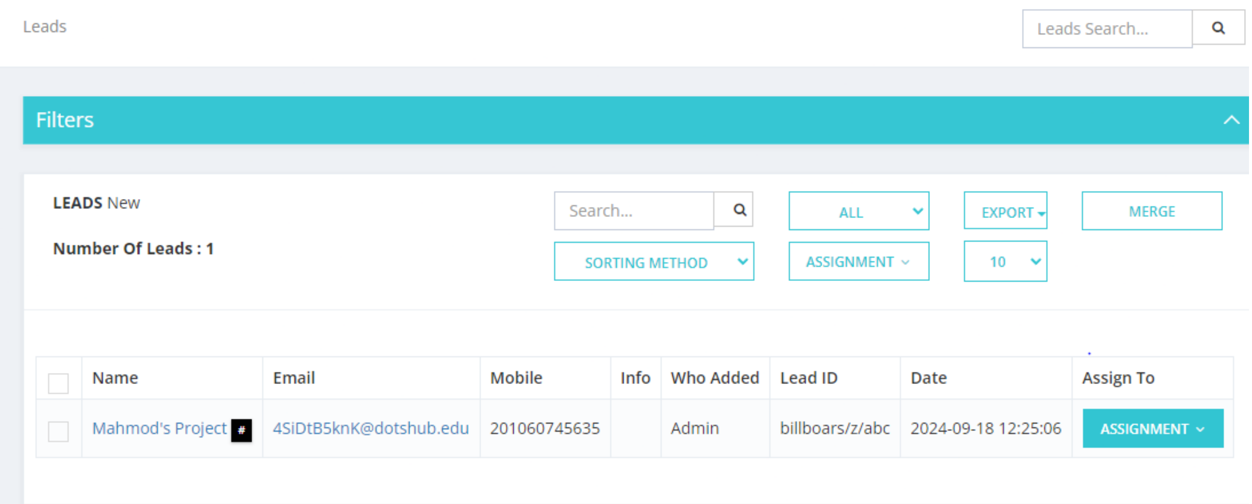
New Leads

This guide covers managing leads, including creating New Leads, managing Lead Stock, handling Duplicated Leads, adding New Leads, and Uploading Leads. If you notice discrepancies between this guide and the product, please report them to ensure corrections.

New Leads

Overview

The **New Leads** section shows all leads that have recently entered the CRM and have **not yet been assigned** to a salesman. Leads arrive here from multiple sources automatically.



How Leads Enter the System

Leads can come into the New Leads section through:

- **Manual entry** — added one by one via Add New Lead
- **Bulk upload** — imported via Excel or CSV file
- **Facebook Integration** — leads from Facebook ads flow in automatically
- **Landing Page** — leads submitted via your website landing page
- **Third-party integrations** — for example, Zapier (useful for platforms without direct integration, such as Snapchat)

What You See in the New Leads List

Each lead shows the following columns:

Column	Description
Name	Full name of the lead
Email	Email address (may be system-generated)
Mobile	Contact number including country code
Info	Additional notes or tags
Who Added	Which user or integration created this lead
Lead ID	The marketing campaign ID attached to the lead
Date	Date and time the lead was created
Assign To	Button to assign the lead to a salesman

Available Actions

- **Search** — find a lead by name, mobile, or email.
- **ALL dropdown** — filter by lead source or type.
- **Export** — download the list.
- **Merge** — combine duplicate leads.
- **Sorting Method** — sort by different criteria.
- **Assignment** — assign selected leads in bulk.

Available Filter Options

Filter	Description
Lead Code	A unique identifier for each lead, used for quick reference.
Creator	The user who created or added the lead to the system.
Country	Filters leads based on phone number country code.

Filter	Description
Lead Origin	Where the lead came from (e.g., Add New, Upload, Facebook, Landing Page).
Campaigns	Filters leads linked to specific marketing or sales campaigns.
Sources	Filters leads linked to a specific source such as WhatsApp or Facebook.
Leads ID	Filters based on specific marketing info / Lead ID.
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.
Tag	Filters by tags or labels applied during data entry.
Age	Filters by age or age group, if collected.
Purpose	Filters by the lead's stated purpose (e.g., inquiry, purchase intent).
Segment	Filters by market segment or demographic group.
Gender	Filters by gender, if that information is collected.
Contact Tools	Filters by contact method used (e.g., phone, email, WhatsApp).
Reply Option	Filters by the lead's preferred reply method.

What to Do with New Leads

1. Review the lead information.
2. Click **Assignment** to assign the lead to a salesman.
3. Once assigned, the lead moves to that salesman's **My Leads → Fresh Leads** tab.

Key Things to Know

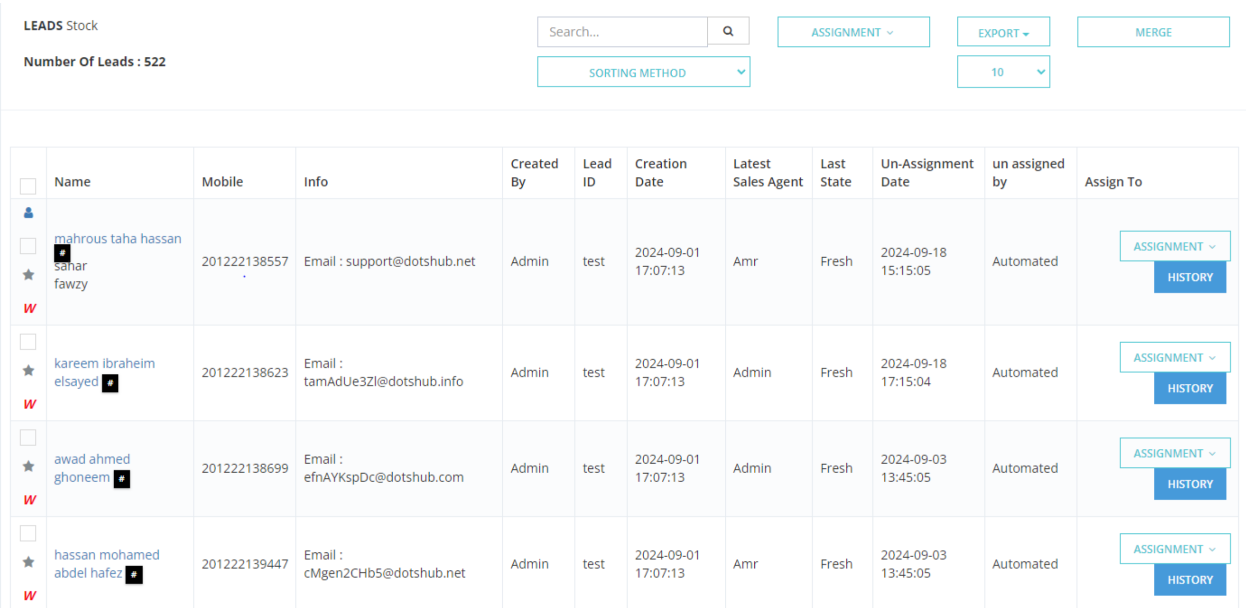
- Leads stay in New Leads until they are assigned.
- After assignment, they disappear from this view and appear in the salesman's My Leads.

- If using **Zapier** for a platform like Snapchat, leads will still land here the same way as any other source.

Leads Stock

Overview

Lead Stock contains leads that have been **withdrawn** from a salesman — either manually, automatically, or because they were unassigned. Think of it as a holding area for leads waiting to be redistributed.



Name	Mobile	Info	Created By	Lead ID	Creation Date	Latest Sales Agent	Last State	Un-Assignment Date	un assigned by	Assign To
mahrous taha hassan sahar fawzy	201222138557	Email : support@dotshub.net	Admin	test	2024-09-01 17:07:13	Amr	Fresh	2024-09-18 15:15:05	Automated	ASSIGNMENT HISTORY
kareem ibraheim elsayed	201222138623	Email : tamAdUe3ZI@dotshub.info	Admin	test	2024-09-01 17:07:13	Admin	Fresh	2024-09-18 17:15:04	Automated	ASSIGNMENT HISTORY
awad ahmed ghoneem	201222138699	Email : efnAYKspDc@dotshub.com	Admin	test	2024-09-01 17:07:13	Admin	Fresh	2024-09-03 13:45:05	Automated	ASSIGNMENT HISTORY
hassan mohamed abdel hafez	201222139447	Email : cMgen2CHb5@dotshub.net	Admin	test	2024-09-01 17:07:13	Amr	Fresh	2024-09-03 13:45:05	Automated	ASSIGNMENT HISTORY

How Leads End Up in Lead Stock

A lead moves to Lead Stock when:

- It is **manually withdrawn** from a salesman by a manager.
- It is **automatically withdrawn** based on time rules configured in Sales Settings → Withdraw.
- It is **unassigned** from a salesman without being reassigned to someone else.

What You See in the Lead Stock List

Column	Description
Name	Full name of the lead
Mobile	Contact number
Created By	Who originally created the lead
Lead ID	Marketing campaign ID
Creation Date	When the lead was first created
Latest Sales Agent	The last salesman this lead was assigned to
Last State	The state the lead was in before being withdrawn
Un-Assignment Date	When the lead was withdrawn
Un-Assigned By	Whether withdrawal was Manual or Automated
Assign To	Button to reassign the lead
History	Button to view the full interaction history of this lead

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Lead Stock vs Leads Returned

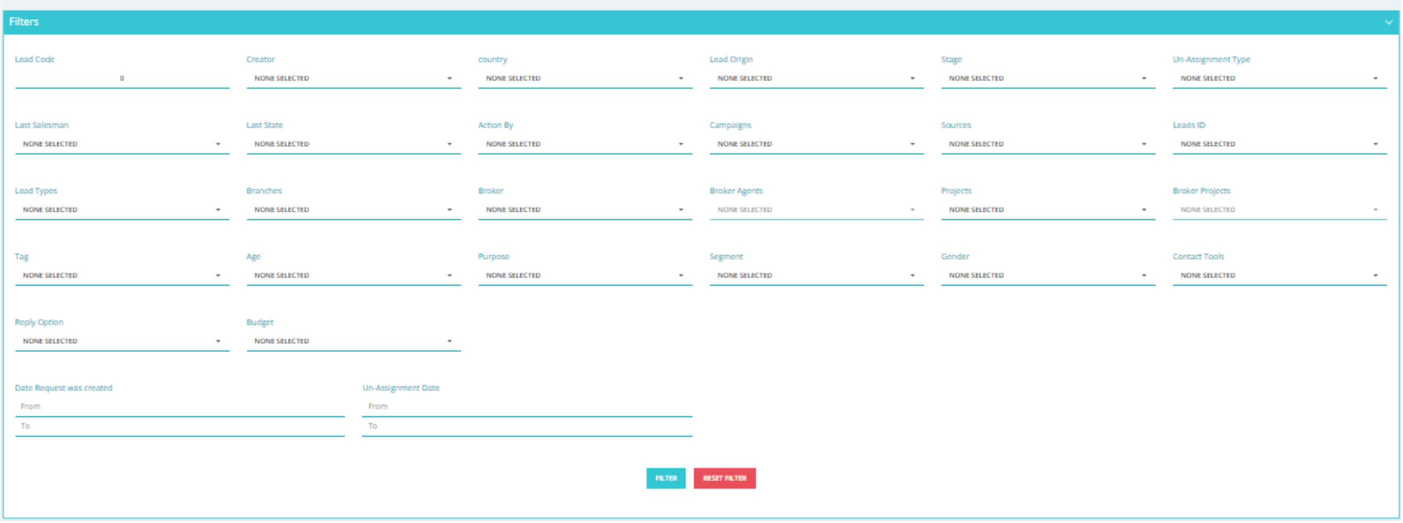
There are two views within Lead Stock:

- **Leads Stock** — standard withdrawn/unassigned leads.
- **Leads Returned** — leads that were specifically withdrawn and are awaiting review. These show additional details including who the lead was withdrawn from and the last action taken. You can **Assign** them or **Ignore** them.

Available Filter Options

Filter	Description
Lead Code	A unique identifier for each lead, used for quick reference.
Creator	The user who originally created the lead.

Filter	Description
Country	Filters leads based on phone number country code.
Lead Origin	Where the lead came from (e.g., Add New, Upload, Facebook).
Stage	Filters leads by their current reservation/sales stage.
Un-Assignment Type	Filters by how the lead was unassigned (manual or automated).
Last Salesman	The last salesman this lead was assigned to before withdrawal.
Last State	The state the lead was in before being withdrawn.
Action By	Filters by the user who last took action on the lead.
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.
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.
Budget	Filters by the lead's budget range.
Date Request was created	Filter by the date the lead was originally created (From / To).
Un-Assignment Date	Filter by the date the lead was withdrawn (From / To).



Available Actions

- **Assignment** — reassign a lead to a salesman.
- **Export** — download the list.
- **Merge** — merge duplicate leads.
- **Sorting Method** — sort by different criteria.
- **History** — view full lead history before reassigning.

Key Things to Know

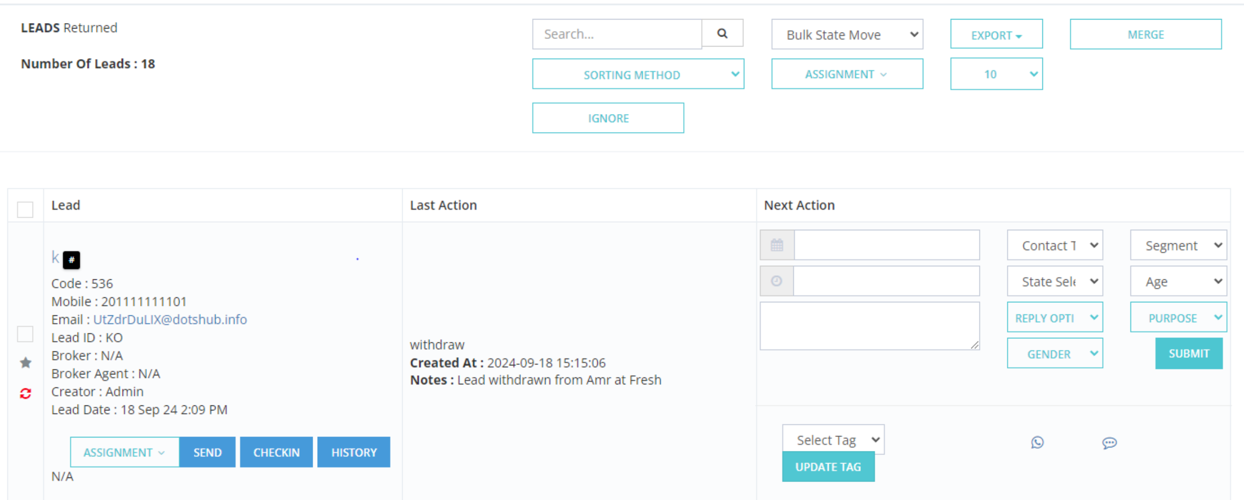
- Lead Stock is different from New Leads — these leads have already been in the system and were previously assigned.
- Always check the **Last State** and **History** before reassigning to understand why the lead was withdrawn.
- You can automate redistribution using **Rotation Settings** (see Sales Settings → Rotation).

Duplicated Leads

Overview

The **Duplicated Leads** screen shows leads that someone attempted to add more than once. Instead of creating a duplicate record, the system flags it here for review.

Duplication is detected based on **mobile number**.



The Duplication Warning

When a user tries to enter a mobile number that already exists in the system, they see this warning on the lead creation page:

> **⚠ Number is Duplicated!!**
>
> 
>

This prevents the duplicate from being accidentally saved as a new lead.

How It Works

When a duplicate lead is submitted (via upload, manual entry, or integration), the system:

1. Does **not** add it as a new lead — it sends it to the Duplicated Leads screen instead.
2. Shows it here as a **notification only** alongside the existing lead record.
3. Displays the new information so you can review and decide what to do.

You can then decide what to do with it.

Available Filter Options

Filter	Description
Lead Code	A unique identifier for each lead, used for quick reference.
Salesman	Filters by the salesman currently assigned to the lead.
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 leads based on phone number country code.
Lead Origin	Where the lead came from (e.g., Add New, Upload, Facebook).
Stage	Filters leads by their 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.
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.

Filter	Description
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 the date the lead was originally created (From / To).
Date action was created	Filter by the date an action was logged on the lead (From / To).
Date action is taking place	Filter by the scheduled date of an action (From / To).
Assignment Date	Filter by when the lead was assigned (From / To).
Duplication Date	Filter by when the duplication was detected (From / To).

Actions You Can Take

Merge

Combine the new information with the existing lead record. For example, if a lead previously listed Cairo as their location but the new entry shows New Cairo, you can merge to update the record with the latest info.

Assign / Reassign

You can assign or reassign the existing lead to a different salesman directly from this screen — without needing to go to the lead's full profile.

Ignore

If the duplicate entry is irrelevant or incorrect, leave it without taking action.

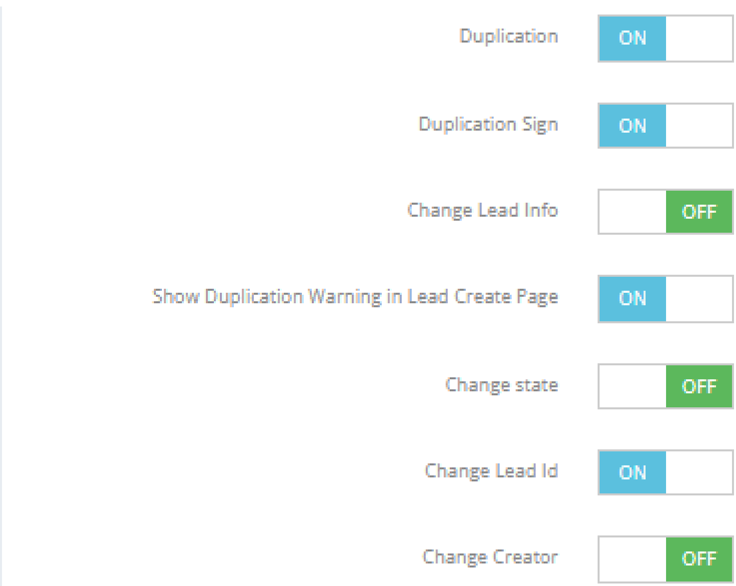
Filters Available

You can filter duplicated leads by date, source, salesman, and other criteria.

How to Enable Duplication Detection

Go to **Settings → Sales Settings → Add Lead & Duplication** and enable the following options as needed:

Option	What It Does
Duplication	Sends duplicate leads to this screen instead of adding them again
Duplication Sign	Adds a visual badge on duplicate lead records
Change Lead Info	Updates the existing lead's info with the new data automatically
Show Duplication Warning on Lead Creation Page	Shows "Number is Duplicated!!" warning when a duplicate mobile is entered manually
Change State	Updates the existing lead's state if the duplicate has a different state
Change Lead ID	Updates the Lead ID if the duplicate carries a different one
Change Creator	Updates the lead's creator when a duplicate comes from a different source



Key Things to Know

- Duplication is based on **mobile number only** — same number = duplicate.
- The duplicate record is shown for **information purposes** — it is not added to the system.
- Regularly reviewing this screen keeps your lead data clean and avoids double-assigning the same contact.

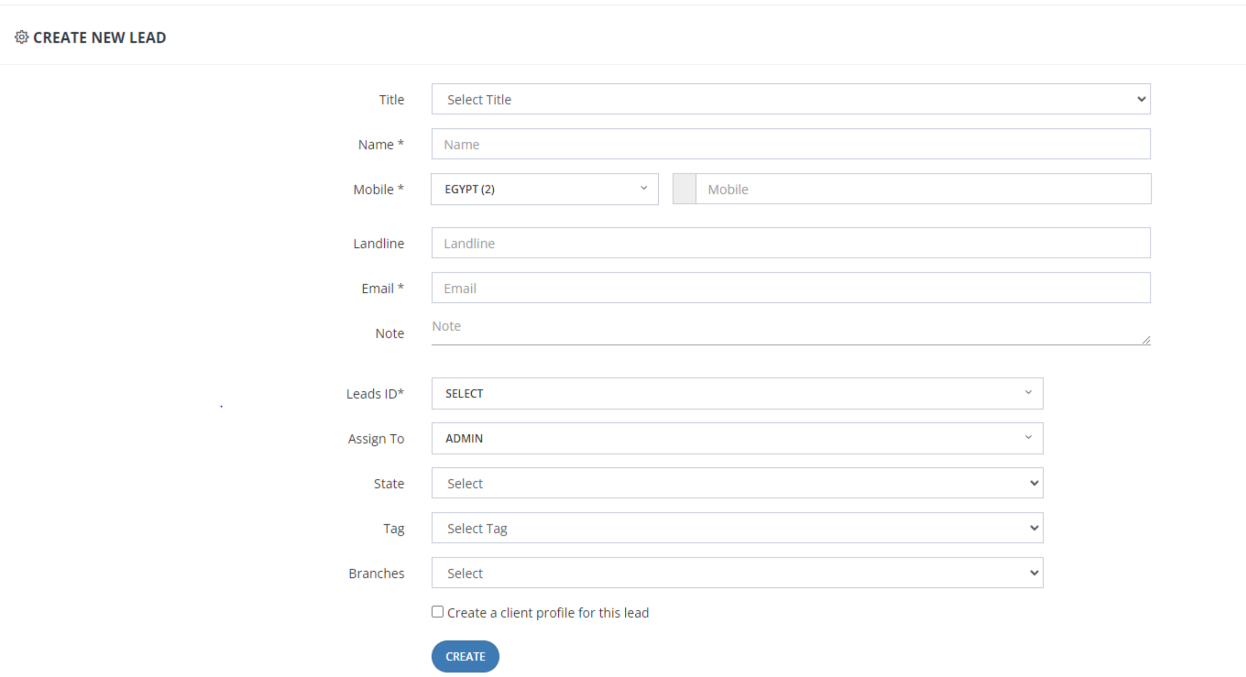
Add / Upload New Lead

Overview

Use this to add a single lead manually into the CRM.

How to Add a New Lead

1. Go to **Sales Module → New Leads → Add New Lead**.
2. Fill in the lead details:
   - **Name** — Full name of the lead. *(Required)*
   - **Mobile** — Must include the country code. Example: `201017601513` for Egypt. *(Required)*
   - **Email** — If the lead has no email, the system can generate a fake one automatically (see tip below). *(Required)*
   - **Lead ID** — Select from the dropdown list. You can also add Lead IDs from the **Marketing Module**. *(Required)*
3. Fill in any additional optional or custom fields as needed.
4. Click **Add**.



> ◻◻ **No email?** Go to **Sales Settings → Add Lead & Duplication** and enable **Generate Fake Email**. Set a fake domain (e.g., `company.com`) so the system auto-fills the email field. This helps distinguish real emails from system-generated ones.

Submission

Once all required fields are completed:

- Click **Submit** to save the lead.
- If the **Create a Client Profile** option is selected, a complete client profile will be created alongside the lead entry.
- If the mobile number is flagged as a duplicate and duplication settings are enabled, the lead will **not** be saved — it will be sent to the **Duplicated Leads** screen instead.
- If no email is provided, a **fake email** will be generated automatically upon submission to ensure the lead entry is complete.

Adding Custom Fields to the Lead Form

You can add custom fields to the Add New Lead screen to capture additional information specific to your business.

Steps to Add Custom Fields

1. Go to **Setup → Fields Setup**.
2. Click **Add New**.
3. Configure the field:
    - **System Form** — Set to **True** to make this field appear on the Add New Lead form.
    - **Field Name** — Enter a name (e.g., Passport Number, Customer Preferences).
    - **Data Type** — Select the appropriate type (text, number, date, etc.).
    - **Set as Unique** — Enable this to prevent duplicate entries for that value (e.g., National ID, Passport Number).
4. **Save** the field. It will now appear on the Add New Lead form for all new entries.

Field Options

- **Required Fields** — Configure whether the custom field is mandatory before the lead can be submitted.
- **Field Behavior** — Control whether the field is visible, editable, or used for reporting purposes.

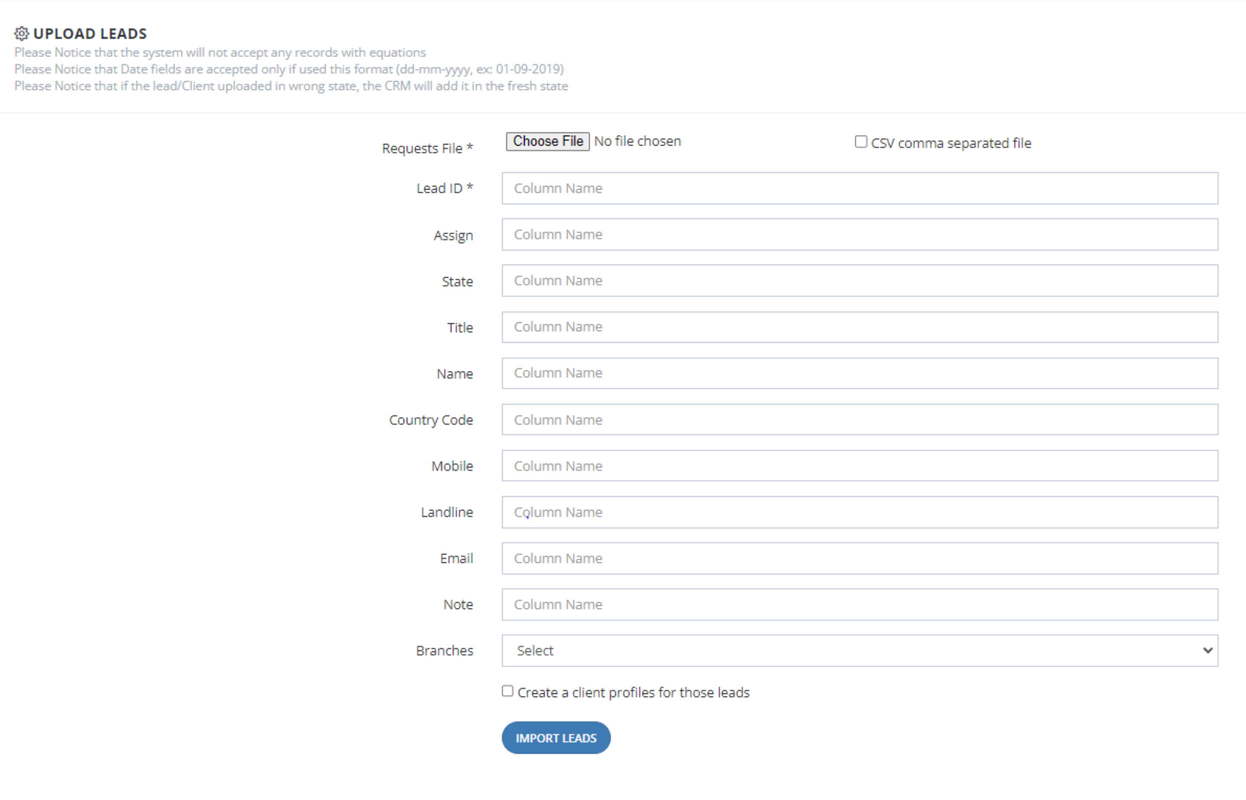
Key Things to Know

- The **Lead ID** is selected from a dropdown — the values come from the Marketing Module.
- The **mobile number must include the country code** .
- After saving, the lead appears in **New Leads** and can be assigned to a salesman.

Upload Leads

Overview

Use this to import multiple leads at once using an **Excel (.xlsx) or CSV** file. This is the most common method when receiving bulk leads from marketing campaigns.



How to Upload Leads

1. Go to **Sales Module → New Leads → Upload Leads**.
2. You will see the CRM's field mapping screen — it lists all available CRM fields.
3. Prepare your Excel or CSV file and **map each column** to the correct CRM field. For example:
   - Your column `Client Name` → CRM field `Name`
   - Your column `Sales` → CRM field `Assign`
4. Upload the file.
5. The system will process the file and either confirm success or generate an **error sheet**.

Critical Field Requirements

These two fields cause the most upload failures — pay close attention:

Salesman Name (Assign field)

- Must be written **exactly as it appears in the CRM** — same spelling, same capitalization, same spacing.

- Do **not** use nicknames, abbreviations, or extra spaces.
- **How to find the correct name:** Check the CRM user list before filling this column.

▯ Wrong	▯ Correct
`ahmed`	`Ahmed Mohamed`
`Ahmed M.`	`Ahmed Mohamed`
`ahmed mohamed ` *(trailing space)*	`Ahmed Mohamed`

Lead ID (Marketing Info)

- This value is generated in the **Marketing Module** — copy it from there directly.
- The Lead ID is **always required** — the upload will fail if this column is missing or incorrect.
- **How to get it:** Go to Marketing Module → find your campaign → copy the Lead ID.

Mobile Number

- Must include the **country code** with no spaces or symbols.
- Example for Egypt: `201017601513`

Reading the Error Sheet

If your upload has errors, the system automatically downloads an **error sheet** showing exactly which rows failed and why.

Error	Cause	Fix
Salesman not found	Name doesn't match CRM exactly	Copy name from CRM user list
Lead ID not recognized	Wrong or missing ID	Copy correct ID from Marketing Module
Invalid mobile number	Missing country code or wrong format	Use format: `20XXXXXXXXXX` for Egypt
Missing required field	A mandatory column is empty	Fill in all required fields

> ⚠ Fix **all** errors in the file before re-uploading — not just the first one.

Tips to Avoid Errors

- Copy the Salesman Name directly from the CRM user list — never type it manually.
- Get the Lead ID from the Marketing Module and type it exactly as it appears — never guess it.
- Always include the country code in the mobile number column.
- Review the full error sheet after each upload and fix everything before re-uploading.

What Happens After a Successful Upload

- Leads are created in the system and appear in **New Leads**.
- If a mobile number already exists in the system and duplication settings are enabled, that row will be sent to the **Duplicated Leads** screen instead of being created as a new lead.
- If no email is provided for a lead, a **fake email** will be generated automatically if that setting is enabled in Sales Settings.

Custom Fields in the Upload File

If your admin has added custom fields to the lead form (via Setup → Fields Setup), these fields may also be available as columns in the upload mapping screen. Map them the same way as standard fields — match your Excel column to the correct CRM field name.