Sales Settings

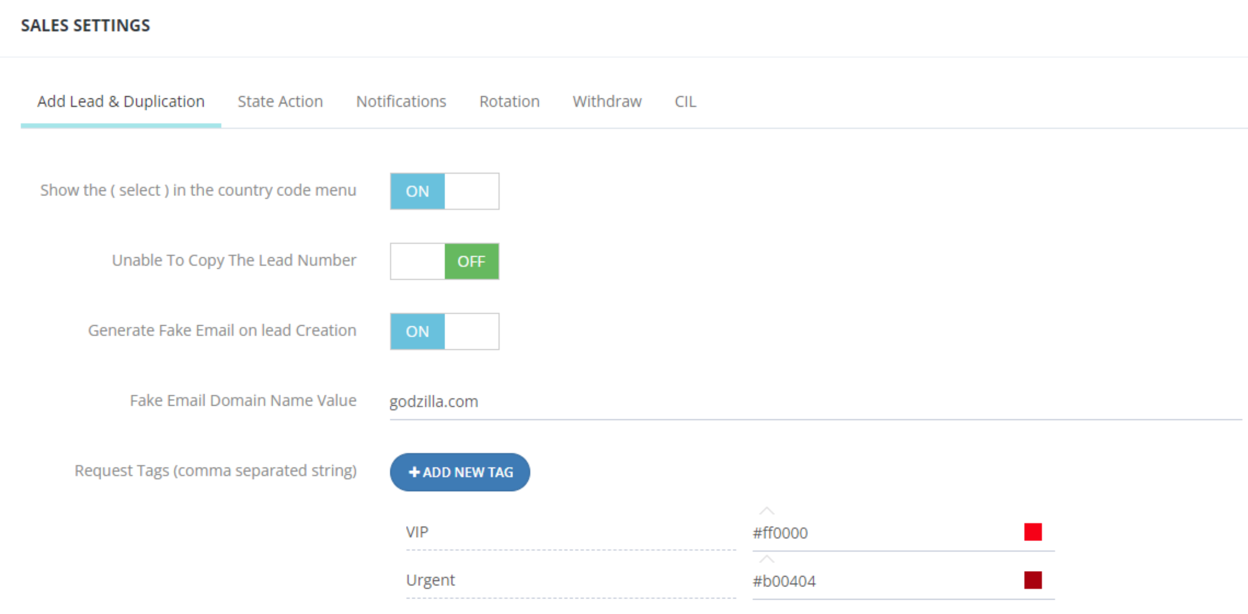
Add Lead & Duplication

Overview

This settings page controls how leads are created and how the system handles duplicate entries.

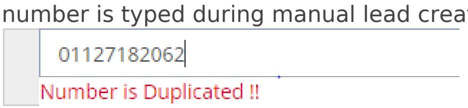
Add Lead Settings

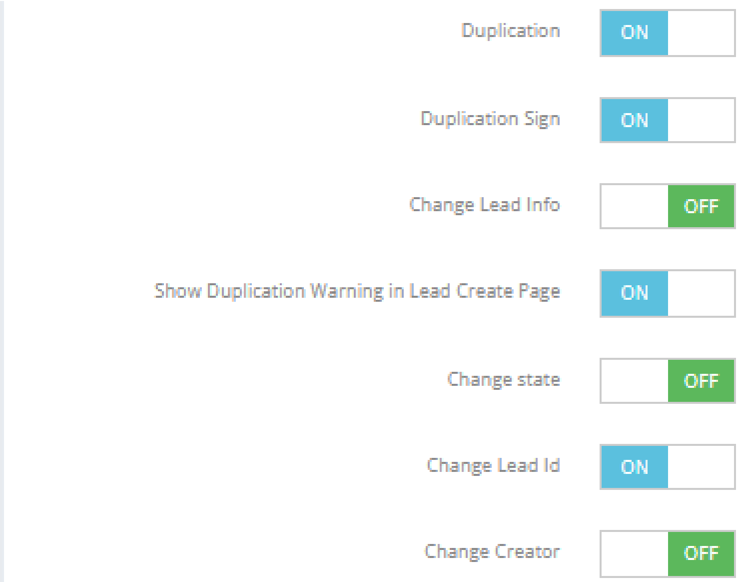
Setting	Description
Show (select) in country code menu	When ON, a blank "select" option appears in the country code dropdown.
Unable to Copy Lead Number	When ON, users cannot copy the lead's mobile number from the CRM.
Generate Fake Email on Lead Creation	When ON, the system auto-generates an email if none is provided.
Fake Email Domain Name	The domain used for fake emails (e.g., `godzilla.com`). Helps distinguish real emails from generated ones.
Request Tags	Define tags with colors applied to leads. Example: `VIP` in red `#ff0000`, `Urgent` in dark red `#b00404`. Click **+ Add New Tag** to add more.



Duplication Settings

Listed in order as they appear in the system:

Setting	Description
Duplication	When ON, duplicate leads go to the Duplicated Leads screen instead of being added again.
Duplication Sign	Adds a visual badge on lead records flagged as duplicates.
Change Lead Info	When ON, the existing lead's info is updated automatically with the new duplicate's data.
Show Duplication Warning on Lead Creation Page	Displays "Number is Duplicated!!" when a duplicate mobile number is typed during manual lead creation. 
Change State	When ON, the existing lead's state is updated if the duplicate carries a different state.
Change Lead ID	When ON, the Lead ID is updated if the duplicate has a different one.
Change Creator	When ON, the creator field is updated if the duplicate comes from a different source.



Other Settings on This Page

Setting	Description
Send view unit email via agent's email	Emails about unit views are sent from the agent's email address.
Leads History Sorting (Descending)	Lead history is shown newest first.

State Action

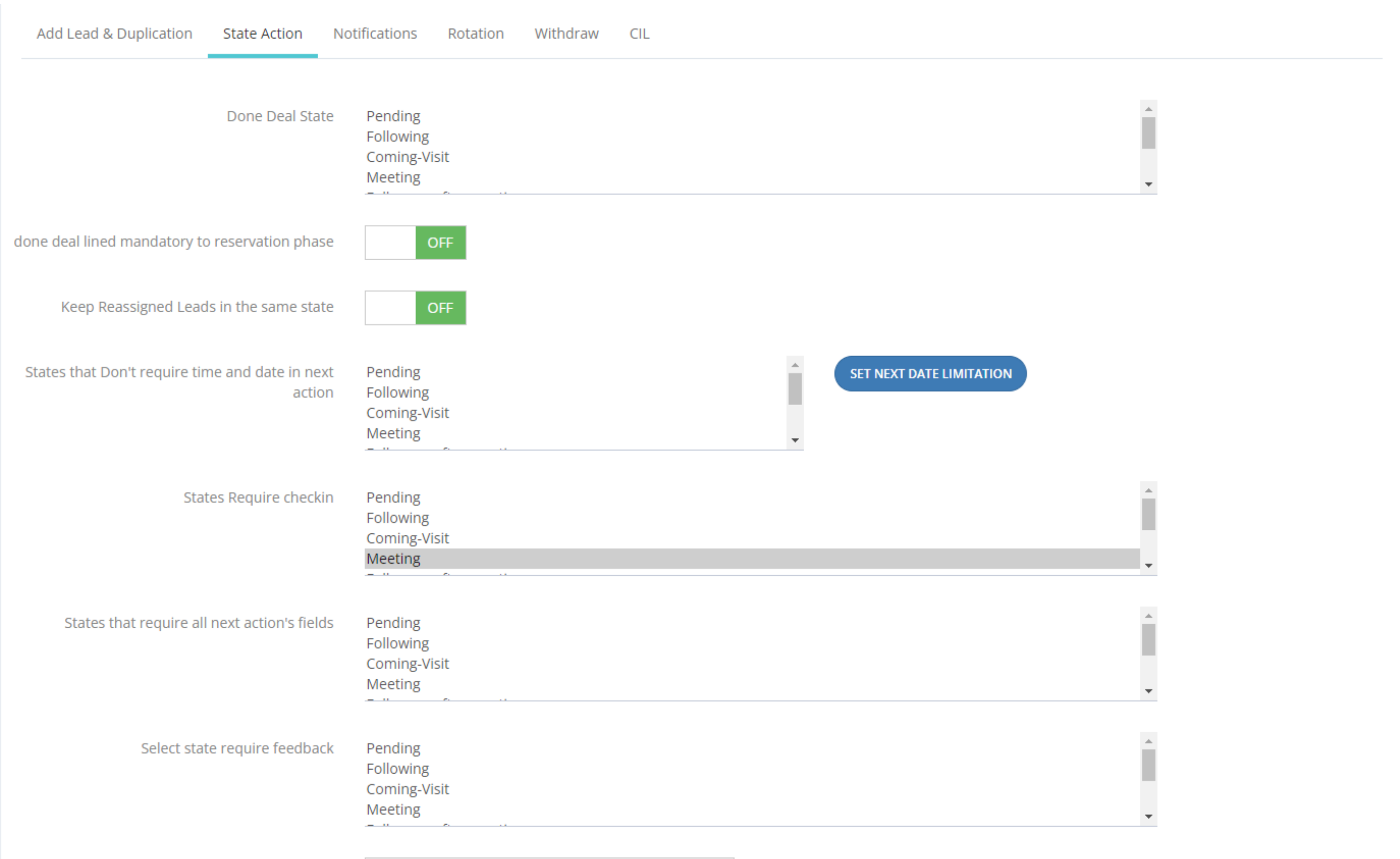
Overview

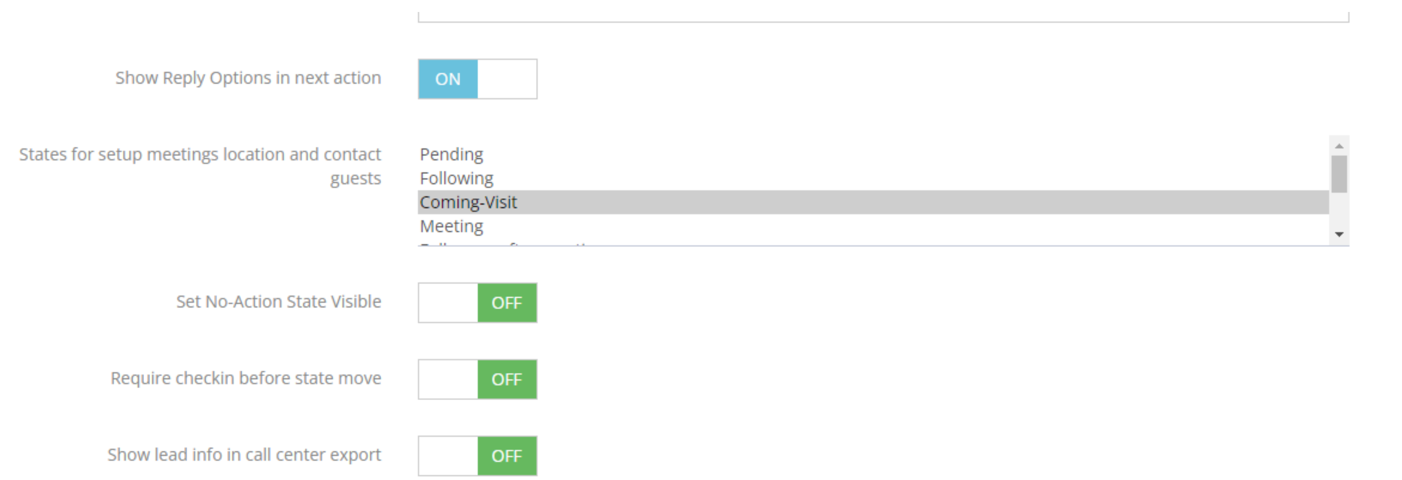
This page controls how lead states behave — what fields are required, when check-ins are needed, and how state changes work.

Settings Reference

Setting	Description
Done Deal State	Defines which states are considered eligible to mark a lead as Done Deal.
Done Deal Line Mandatory to Reservation Phase	When ON, a lead must be in Done Deal state before it can move to reservation.
Keep Reassigned Leads in the Same State	When ON, reassigned leads stay in their current state. When OFF, they go back to Fresh Leads.
States That Don't Require Time and Date in Next Action	For these states, the salesman can log a next action without setting a date/time.
States Require Check-in	A check-in must be logged when the lead is in one of these states.
States That Require Contact Tool Field	The contact method field (call, WhatsApp, etc.) is mandatory in these states.
States That Require Reply Option Field	A reply option must be selected in these states.
States That Require Segment Field	The segment field is mandatory in these states.
States That Require Age Field	The age field is mandatory in these states.
States That Require Purpose Field	The purpose field is mandatory in these states.
States That Require Gender Field	The gender field is mandatory in these states.
Select State Require Feedback	Feedback is mandatory when moving a lead to these states.
Set Next Date Limitation	Configures date constraints for next actions in selected states.
Show Reply Options in Next Action	When ON, reply options appear in the next action form for selected states.

Setting	Description
States for Setup Meetings Location and Contact Guests	These states allow setting a meeting location and adding guest contacts.
Set No-Action State Visible	When ON, the "No-Action" state becomes visible to users.
Require Check-in Before State Move	When ON, a check-in must be completed before changing a lead's state.
Show Lead Info in Call Center Export	When ON, lead details are included in call center export files.
Lead Sorting Method	Sets the default sorting order for leads across tabs.





Notifications

Overview

This page controls when and how the system sends email and in-app notifications related to leads.

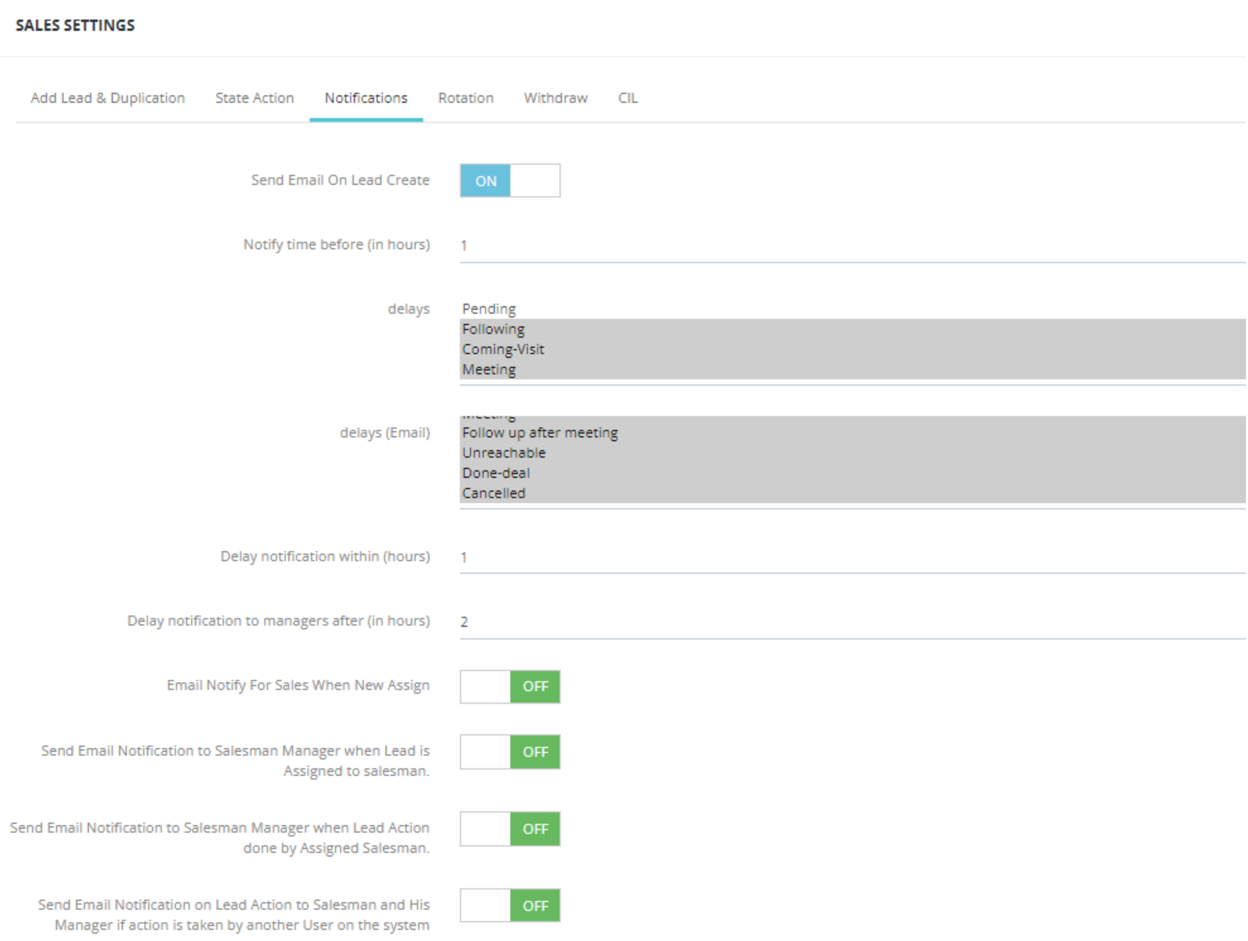
Notification Settings

Setting	Description
Send Email on Lead Creation	Sends an email automatically whenever a new lead is created.
Notify Time Before (in hours)	Sets how many hours in advance a reminder notification is sent before a scheduled action.

Delay Notifications

Delay notifications alert managers when a lead has gone too long without action.

> ⚠ **How Delay and Withdraw work together:** The delay timer starts first — once a lead becomes delayed (no action taken within the configured hours), the system begins sending delay notifications. After that, the **Withdraw** timer kicks in and the lead gets pulled from the salesman and moved to Lead Stock. In other words, delay notifications are the warning, and withdraw is the consequence. Make sure the delay hours are set to less than the withdraw hours in Withdraw Settings so the salesman gets notified before the lead is taken away.



Setting	Description
Delays (Notification Triggers)	Select which lead states trigger a delay notification.
Delays (Email Notifications)	Select which states trigger a delay **email** notification.
Within (hours)	How long a lead can be inactive before the first notification is sent. Default: 1 hour.
Notification to Managers After (hours)	How long before the manager is also notified. Default: 2 hours.

> Delay notifications repeat every **30 minutes**. If set to 2 hours, the system sends **4 notifications** total before stopping.

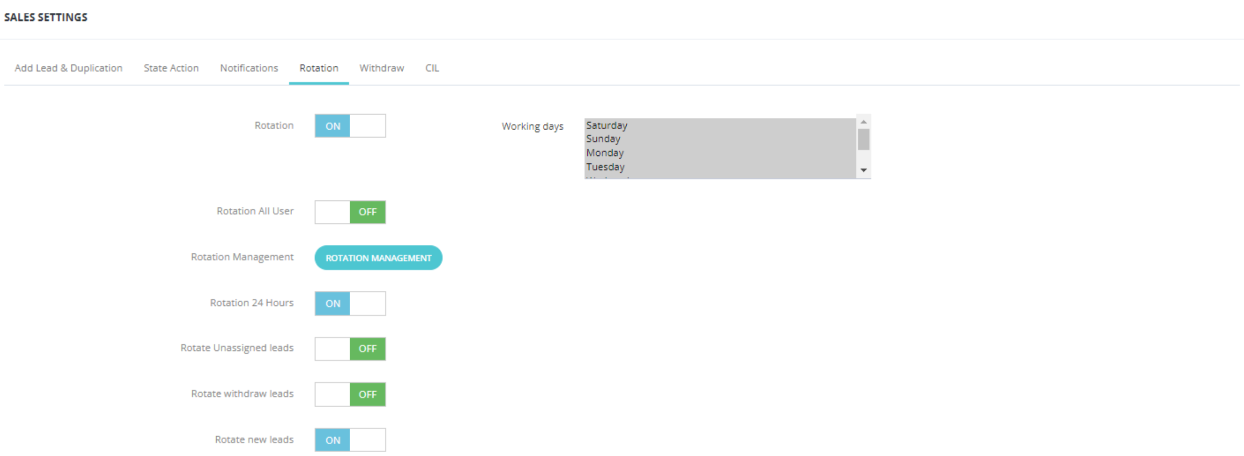
Sales Assignment Email Notifications

Trigger	Who Gets Notified
New lead assigned	Salesman + their manager
Assigned salesman completes an action	Manager only
Another user takes action on the lead	Salesman + their manager

Rotation

Overview

The **Rotation** feature automates how leads are distributed across the sales team. Instead of manually assigning each lead, the system can rotate leads evenly or based on conditions.



Rotation Options

Option	Description
Rotation All Users	Rotates leads among all active salesmen.
Rotation Management	Rotates leads to specific users only (selected manually). To configure which users are included, go to **Setup → Rotation Management**.
Rotation 24 Hours	Runs the rotation continuously, 24/7, including outside working hours.

Lead Rotation Types

Type	Description

Rotate Unassigned Leads	Automatically assigns leads that have no salesman assigned.
Rotate Withdrawn Leads	Reassigns leads that were withdrawn back into the sales pipeline.
Rotate New Leads	Distributes newly created leads evenly among the team.

Rotation Conditions

You can add custom conditions to control how leads are rotated:

Condition	Description
Type	The category or type of lead to rotate.
Item Value	The specific value to match.
Salesman	Which salesman receives these leads.
Role	Rotate based on user role.
Quota	How many leads each salesman receives per rotation cycle.
Interval	Time interval between each rotation assignment.

Working Days

Configure which days of the week rotation is active to match your team's schedule.

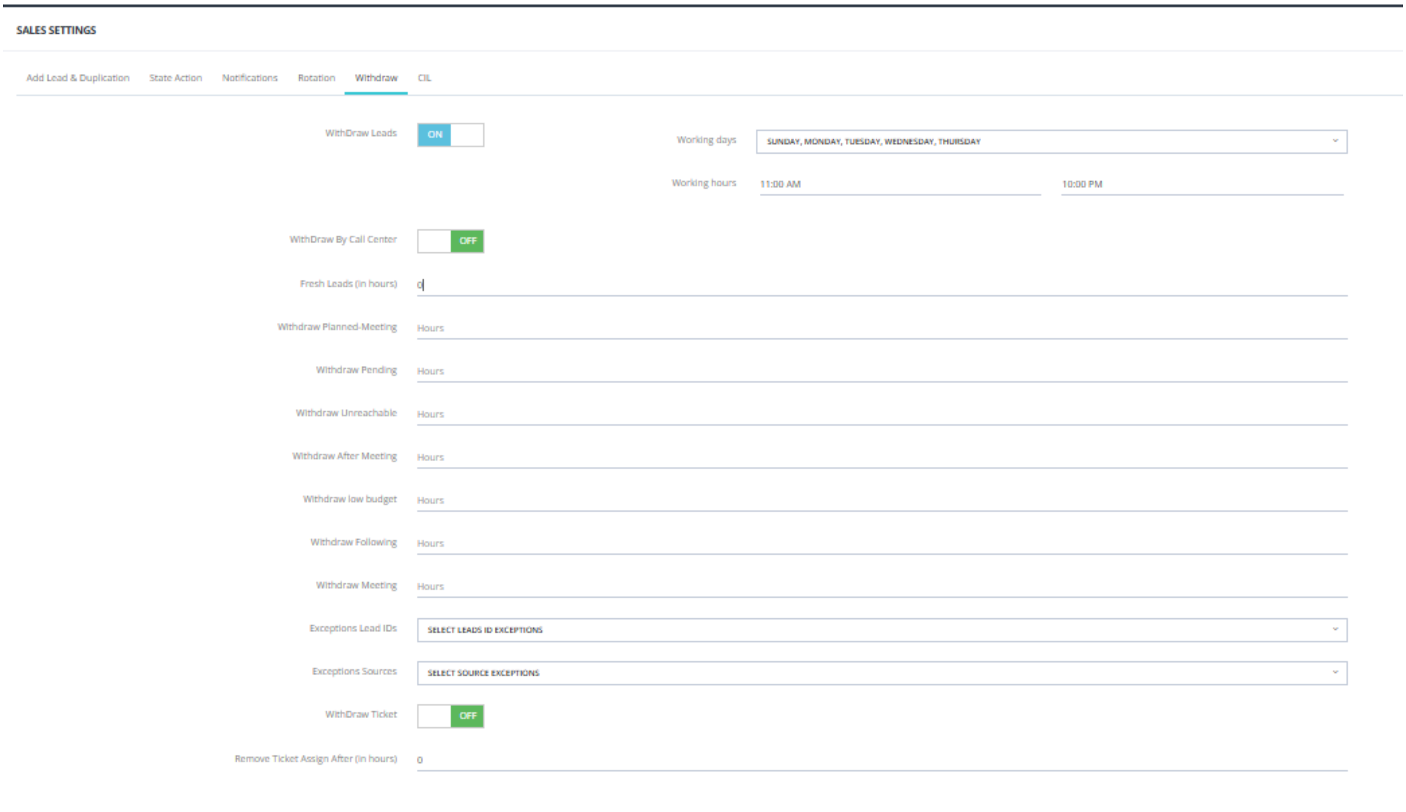
Key Things to Know

- Rotation runs automatically based on the rules you configure — no manual action needed.
- Leads go to the salesman's **Fresh Leads** tab after rotation.
- Use **Rotation Management** if you want to control exactly who receives which leads.

Withdraw

Overview

The **Withdraw** settings control when leads are automatically taken back from a salesman due to inactivity. Withdrawn leads move to **Lead Stock** and can be reassigned.



Main Switch

Setting	Description
Withdraw Leads	Master ON/OFF switch for the entire withdraw feature.
Working Days	Which days of the week the withdraw rules apply (e.g., Sunday–Thursday).
Working Hours	The time window during which withdraw rules are active (e.g., 11:00 AM – 10:00 PM).

Withdraw Settings

Setting	Description
Withdraw by Call Center	When ON, allows the call center team to manually withdraw leads from salesmen.
Fresh Leads (in hours)	How long a lead can sit in Fresh Leads without action before being withdrawn.

Withdraw by State

Set specific withdrawal timeframes per lead state. Leave blank to disable withdrawal for that state.

> Only states that have a **Next Action Date** set will appear here. States without a next action date will not show up in this section.

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State	Setting
Planned Meeting	Hours of inactivity before withdrawal.
Pending	Hours of inactivity before withdrawal.
Unreachable	Hours of inactivity before withdrawal.
After Meeting	Hours of inactivity before withdrawal.
Low Budget	Hours of inactivity before withdrawal.
Following	Hours of inactivity before withdrawal.
Meeting	Hours of inactivity before withdrawal.

Exceptions

Setting	Description

Exceptions Lead IDs	Leads with these Lead IDs will **not** be withdrawn, even if inactive.
Exceptions Sources	Leads from these sources will **not** be withdrawn automatically.

Ticket-Related Withdraw

Setting	Description
Withdraw Ticket	When ON, leads associated with a support ticket can be withdrawn.
Remove Ticket Assignment After (hours)	How long before the ticket assignment is removed automatically.

How Withdraw Works with Delay Notifications

The system follows this sequence:

1. Lead becomes inactive (no action taken).
2. **Delay notifications** start firing — alerting the salesman and manager (configured in Notifications Settings).
3. Once the withdraw timer expires, the lead is **automatically withdrawn** and moved to Lead Stock.

> Set your **delay hours** to be less than your **withdraw hours** so the salesman gets a warning before the lead is taken away.

Key Things to Know

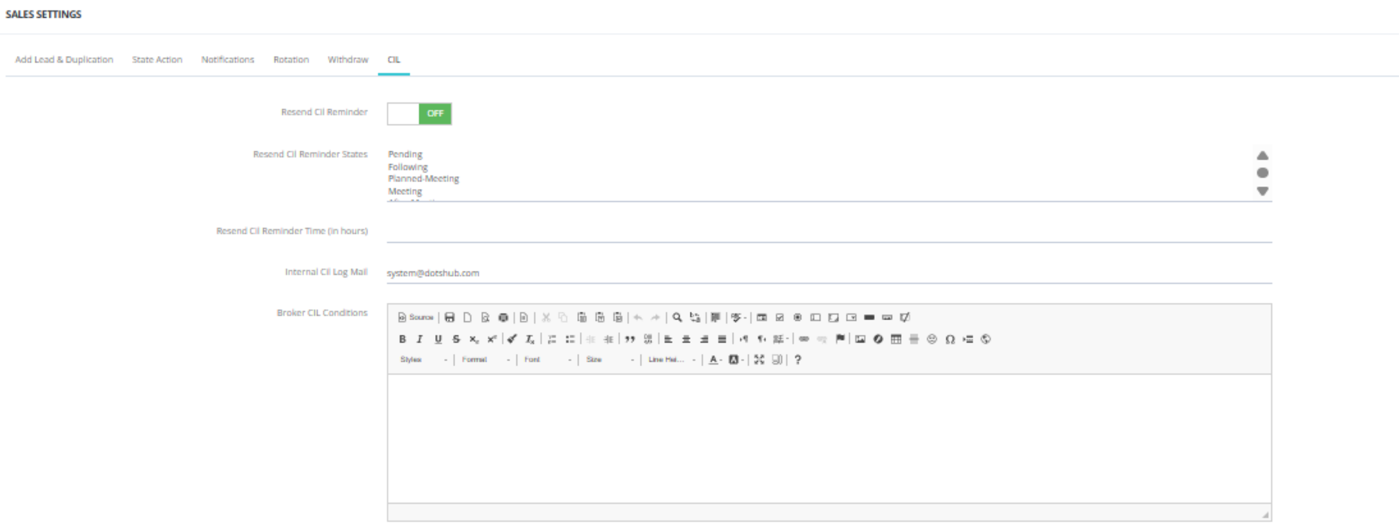
- Withdrawn leads move to **Lead Stock** — they are not deleted.
- From Lead Stock, they can be reassigned manually or via Rotation.
- Withdraw rules only apply during the configured **working days and hours**.

- Use **Exceptions** to protect important lead sources or campaigns from being auto-withdrawn.

CIL

Overview

CIL (Client Information Letter) settings control how and when CIL reminders are sent to clients and brokers.



CIL Settings

Setting	Description
Resend CIL Reminder	When ON, the system automatically resends CIL reminders.
Resend CIL Reminder States	Select which lead states trigger a CIL reminder resend.
Resend CIL Reminder Time (in hours)	How many hours after the original CIL before the reminder is resent.
Internal CIL Log Mail	Sends an internal email log when a CIL is issued.
Broker CIL Conditions	Defines the conditions under which a CIL is sent to brokers.