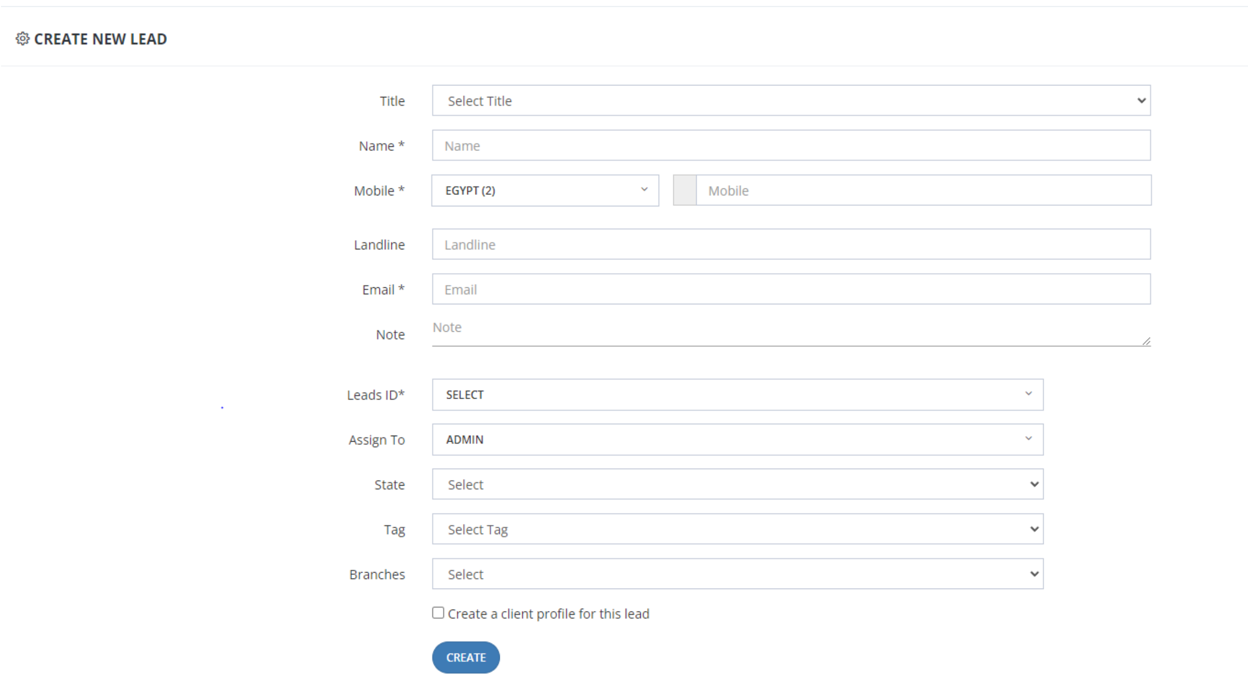
Add / Upload New Lead

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.

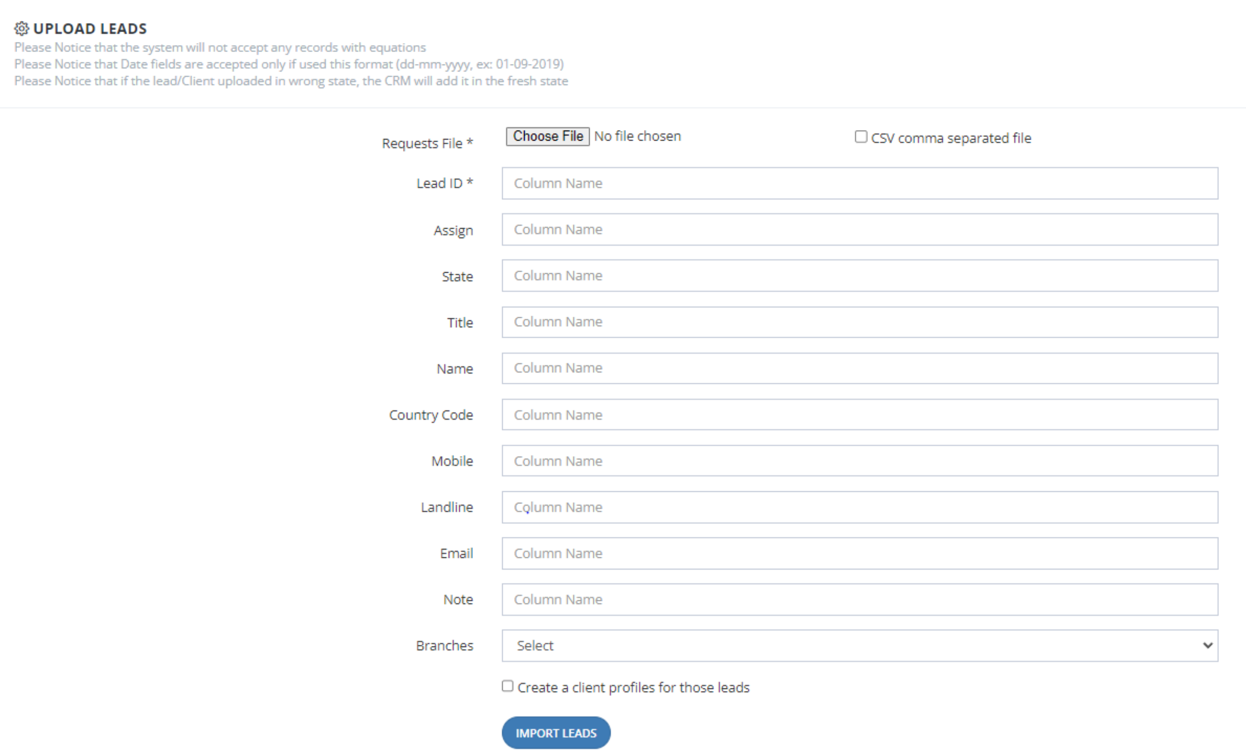
Key Things to Know

- 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.

Created 2026-06-24 09:07:21 UTC by Admin
Updated 2026-06-28 08:19:11 UTC by Admin