

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

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## 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**.

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## Available Filter Options

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

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

Filters
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|                                 |  |                                |  |                                    |  |                        |  |
|---------------------------------|--|--------------------------------|--|------------------------------------|--|------------------------|--|
| <b>Actions creator</b>          | <input type="text" value="NONE SELECTED"/> | <b>Current Salesman</b>        | <input type="text" value="NONE SELECTED"/> | <b>Affected Salesman</b>           | <input type="text" value="NONE SELECTED"/> | <b>Assigned From</b>   | <input type="text" value="NONE SELECTED"/> |
| <b>Actions</b>                  | <input type="text" value="NONE SELECTED"/> | <b>Tag</b>                     | <input type="text" value="SELECT TAG"/>    | <b>Leads creator</b>               | <input type="text" value="NONE SELECTED"/> | <b>LeadID</b>          | <input type="text" value="NONE SELECTED"/> |
| <b>Sources</b>                  | <input type="text" value="NONE SELECTED"/> | <b>Lead Types</b>              | <input type="text" value="NONE SELECTED"/> | <b>Reply State</b>                 | <input type="text" value="NONE SELECTED"/> | <b>Broker</b>          | <input type="text" value="NONE SELECTED"/> |
| <b>Broker Agents</b>            | <input type="text" value="NONE SELECTED"/> | <b>Assignment Type</b>         | <input type="text" value="NONE SELECTED"/> | <b>State</b>                       | <input type="text" value="NONE SELECTED"/> | <b>Lead Origin</b>     | <input type="text" value="NONE SELECTED"/> |
| <b>Date Request was created</b> |  | <b>Date action was created</b> |  | <b>Date action is taking place</b> |  | <b>Assignment Date</b> |  |
| From                            | <input type="text"/>                       | From                           | <input type="text"/>                       | From                               | <input type="text"/>                       | From                   | <input type="text"/>                       |
| To                              | <input type="text"/>                       | To                             | <input type="text"/>                       | To                                 | <input type="text"/>                       | To                     | <input type="text"/>                       |

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.
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