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**.

Visibility Based on Hierarchy

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

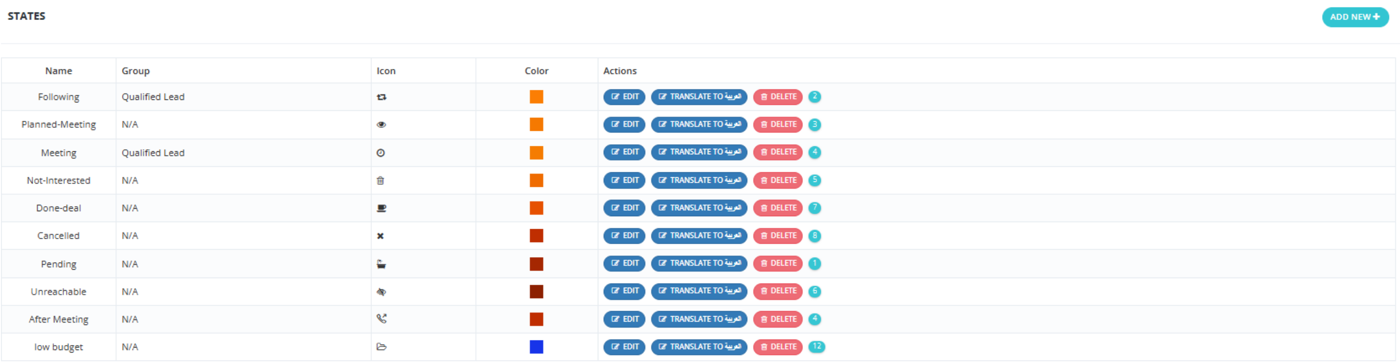
Common Features Across All Tabs

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

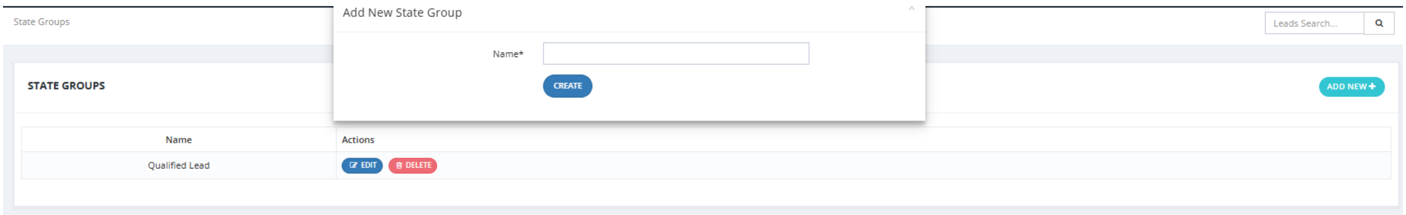
Tab Management

- 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



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.
Lead Types	Filters by lead type (e.g., Lead, Broker Lead, Broker Request, CIL).

Filter	Description
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).

Created 2026-06-24 09:10:09 UTC by Admin
Updated 2026-06-30 10:54:25 UTC by Admin