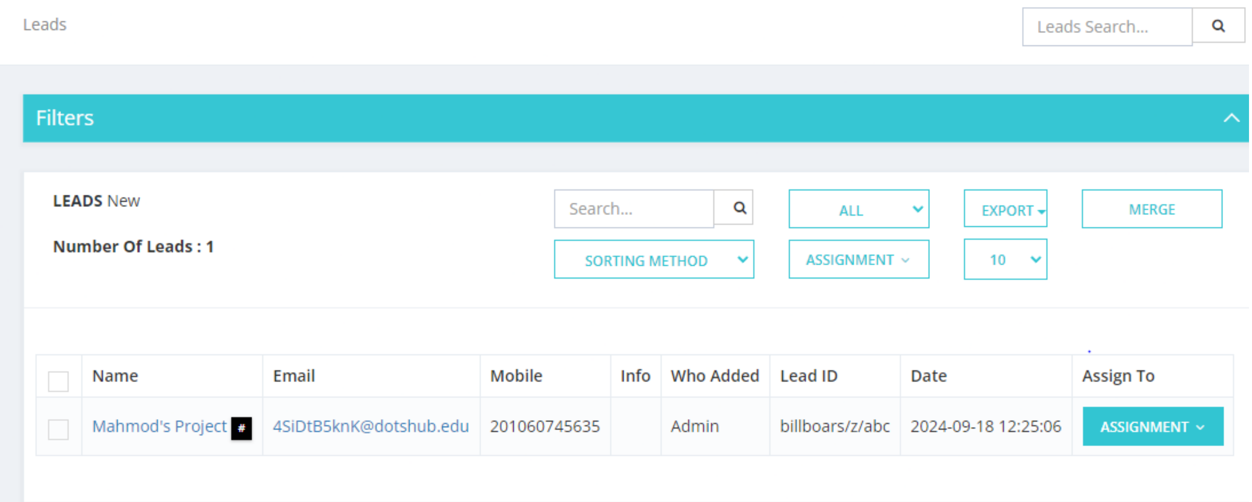
New Leads

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.

Created 2026-06-23 17:33:44 UTC by Admin
Updated 2026-06-28 08:13:32 UTC by Admin