

Add Lead

Overview

Use **Add Lead** when a caller is a new potential client who has not previously been in the system.

How to Add a Lead from the Call Center

1. Go to **Call Center** → **Add Lead**.
2. Fill in the caller's details — same fields as a standard new lead (Name, Mobile, Email, Lead ID, etc.).
3. Choose one of the following:

Option A: Add as a Full Lead

- Fill in all required fields and click **Add**.
- The lead is created and can be assigned to a salesman.
- Once assigned, it moves to the salesman's **My Leads** → **Fresh Leads** tab.

Option B: Just Asking

Tag

Just Asking

If Request is Assigned to any salesman, Just Asking will be cancelled.

- If it's unclear whether the caller is a genuine lead, click **Just Asking** instead of Add.
- The entry is saved but **not assigned** to any salesman — it stays in the Call Center page.

- If the same person calls again later and shows real interest, you can click **Convert to Lead** to turn the entry into a full lead.

Type	Name	Phone	Communication Method	Note	Date	Salesman	Leads ID	Project	Source	Unit Type	Related Item	Done Date	User	Recall Project	State
Just Asking	Ahmed	201094489556			2026-06-25 12:38:19		PROJECT Z CAMPAIGN/SMILE AGENCY/FB	-Elite Living	-Facebook		None		Admin		CONVERT TO LEAD

Just Asking — Key Points

- Used when the call may or may not be a real lead.
- No assignment is made — the entry stays in the Call Center log.
- A **Convert to Lead** button appears on the entry if you need to upgrade it later.
- Keeps the sales pipeline clean from unqualified contacts.

Created 2026-06-28 08:30:05 UTC by Admin

Updated 2026-06-28 08:31:40 UTC by Admin