

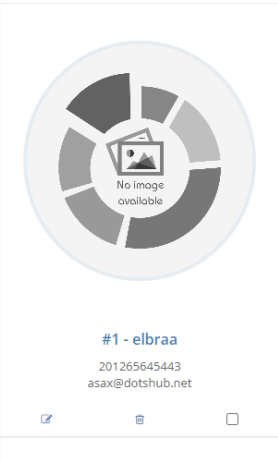
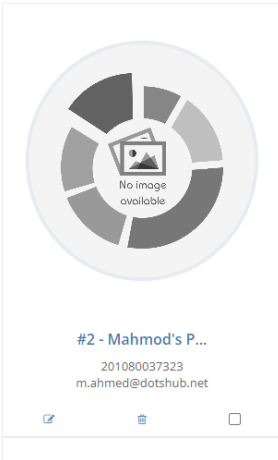
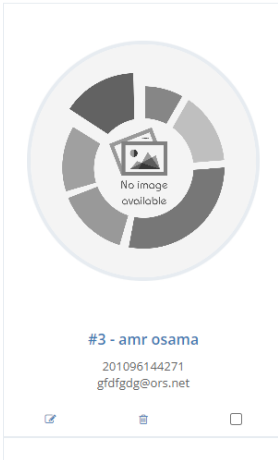
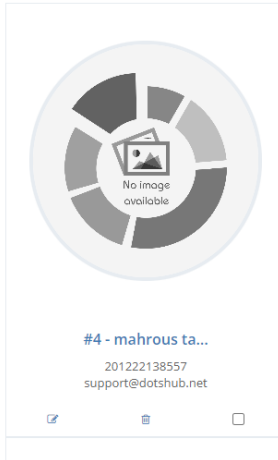
# Client

## Overview

The **Clients** module allows users to view, manage, and update client information. Each client is displayed as a card with their key details. The total number of clients is shown at the top of the page.

CLIENTS All  [RESET & SEND NEW CREDENTIALS ▲](#) [EXPORT ▼](#)

Number Of Clients : 8

 <p>#1 - elbraa 201265645443 asax@dotshub.net</p>	 <p>#2 - Mahmud's P... 201080037323 m.ahmed@dotshub.net</p>	 <p>#3 - amr osama 201096144271 gdfgdg@ors.net</p>	 <p>#4 - mahrous ta... 201222138557 support@dotshub.net</p>
---	---	---	---

## Client Information

Each client profile includes:

- **Client ID** — A unique ID assigned to each client.
- **Name** (Arabic & English)
- **Mobile** — Contact number.
- **Email** — Email address.
- **Broker / Broker Agent** — If the client was referred by a broker or agent.
- **Sales Team** — The salespeople responsible for this client.
- **Notes** — Any notes recorded about the client.
- **Files & Private Files** — Documents related to the client.

# Available Actions

- **Search Clients** — Find a client by name or other details.
- **Export Clients** — Export the client list in CSV or Excel format.
- **Reset & Send New Credentials** — Reset a client's login credentials and send the updated info to their email.
- **Edit Client** — Modify the client's details.
- **Delete Client** — Remove the client from the system.

## When to Create a Client Profile

A client profile is created when a lead reaches the **Done Deal** state and is converted into a client.

## How to Create the Profile

1. Go to the **Leads** tab.
2. Open the lead that is in **Done Deal** status.
3. Click **Convert to Client**.
4. Fill in the additional required fields for the client profile.
5. Click **Save** — the lead is converted into a client profile and added to the Clients module with all related information.

LEAD : (HANY ETTOUNSY) CODE : 234

CALL LOGS ASSIGNMENT SEND UPDATE LEAD INFO **CREATE CLIENT PROFILE** MOVE TO TRASH

---

Company name

---

Company Type

---

Job title

---

Budget

---

Name hany ettounsy Select Tag UPDATE TAG

---

Mobile 201814740756 WhatsApp Facebook Telegram Skype Message

---

Mobile 2 201133222645

---

Whatsapp number

---

Landline

# Adding Custom Fields to the Client Form

You can add custom fields to the Convert to Client 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:
  - **Client Form** — Set to **True** to make this field appear on the Convert to Client 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 to prevent duplicate entries for that value (e.g., National ID, Passport Number).
4. **Save** — the field will now appear on the client form for all new conversions.

---

Created 2026-06-25 09:42:45 UTC by Admin

Updated 2026-06-28 08:41:24 UTC by Admin