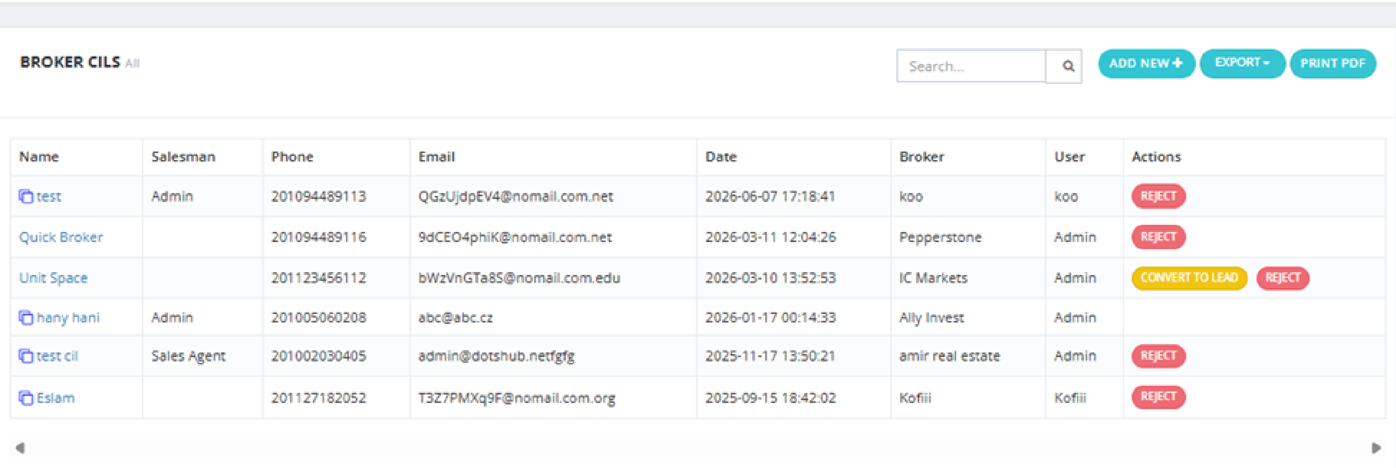
Broker CILs

Overview

Broker CILs (Client Information Letters) are submitted by broker companies through their own CRM login. This tab shows all CILs received from brokers.



How It Works

1. A broker company has a profile in the system and can **log in to the CRM**.
2. They submit CILs for clients they are bringing to you.
3. The CIL appears in this tab for review.

Broker CILs List

Column	Description
Name	Client name on the CIL.
Salesman	Salesman assigned (if converted).
Phone	Client phone number.

Column	Description
Email	Client email address.
Date	Date the CIL was submitted.
Broker	The broker company that submitted the CIL.
User	The user who processed the CIL.
Actions	Convert to Lead or Reject.

Converting a CIL to a Lead

1. Review the CIL details.
2. Click **Convert to Lead**.
3. Select the **salesman** to assign the lead to.
4. The salesman must be linked to the broker company — otherwise they won't appear in the dropdown.
5. Confirm — the CIL becomes a lead in the salesman's pipeline.

> ⚠ If the CIL shows **Reject** instead of Convert to Lead, it means the lead already exists in the system as a duplicate. Check the Duplicated Leads section.

Filters

Filter	Description
Date	Filter by submission date (From / To).
Broker	Filter by broker company.
Broker Agents	Filter by specific broker agent.

Adding Custom Fields to the CIL Form

1. Go to **Setup → Fields Setup**.
2. Click **Add New**.
3. Set **CIL** option to **True**.
4. Configure: Field Name, Data Type, Set as Unique if needed.
5. **Save** — the field will appear on the CIL form.

Adding a CIL Manually

You can also add a CIL manually by clicking **Add New** in this tab and filling in the client details.

Created 2026-06-28 09:03:44 UTC by Admin
Updated 2026-06-28 09:04:06 UTC by Admin