

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.

| Name | Salesman | Phone | Email | Date | Broker | User | Actions |
|--------------|-------------|--------------|---------------------------|---------------------|------------------|--------|------------------------|
| test | Admin | 201094489113 | QGzUjdpEV4@nomail.com.net | 2026-06-07 17:18:41 | koo | koo | REJECT |
| Quick Broker | | 201094489116 | 9dCEO4phiK@nomail.com.net | 2026-03-11 12:04:26 | Pepperstone | Admin | REJECT |
| Unit Space | | 201123456112 | bWzVnGTa8S@nomail.com.edu | 2026-03-10 13:52:53 | IC Markets | Admin | CONVERT TO LEAD REJECT |
| hany hani | Admin | 201005060208 | abc@abc.cz | 2026-01-17 00:14:33 | Ally Invest | Admin | |
| test cil | Sales Agent | 201002030405 | admin@dotshub.netfgfg | 2025-11-17 13:50:21 | amir real estate | Admin | REJECT |
| Eslam | | 201127182052 | T3Z7PMXq9F@nomail.com.org | 2025-09-15 18:42:02 | Kofiii | Kofiii | REJECT |

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.
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Adding a CIL Manually

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

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