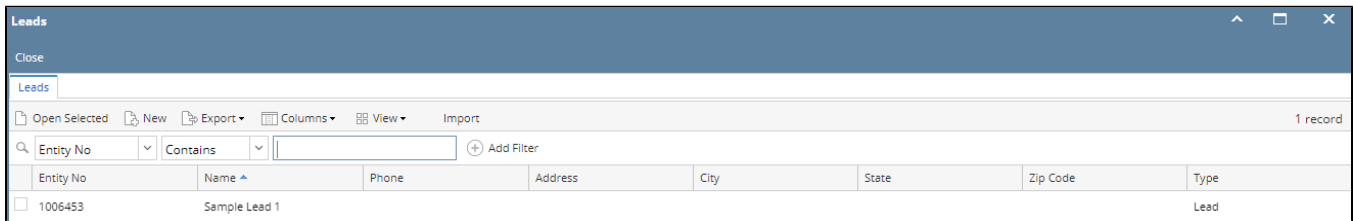


Create Lead

1. From **CRM** module, click **Leads**. Leads screen will appear.



The screenshot shows the 'Leads' screen with a table containing one record. The table has columns: Entity No, Name, Phone, Address, City, State, Zip Code, and Type. The record has Entity No 1006453, Name Sample Lead 1, and Type Lead.

Entity No	Name	Phone	Address	City	State	Zip Code	Type
1006453	Sample Lead 1						Lead

2. Click **New** toolbar button. Create New Entity screen will appear.

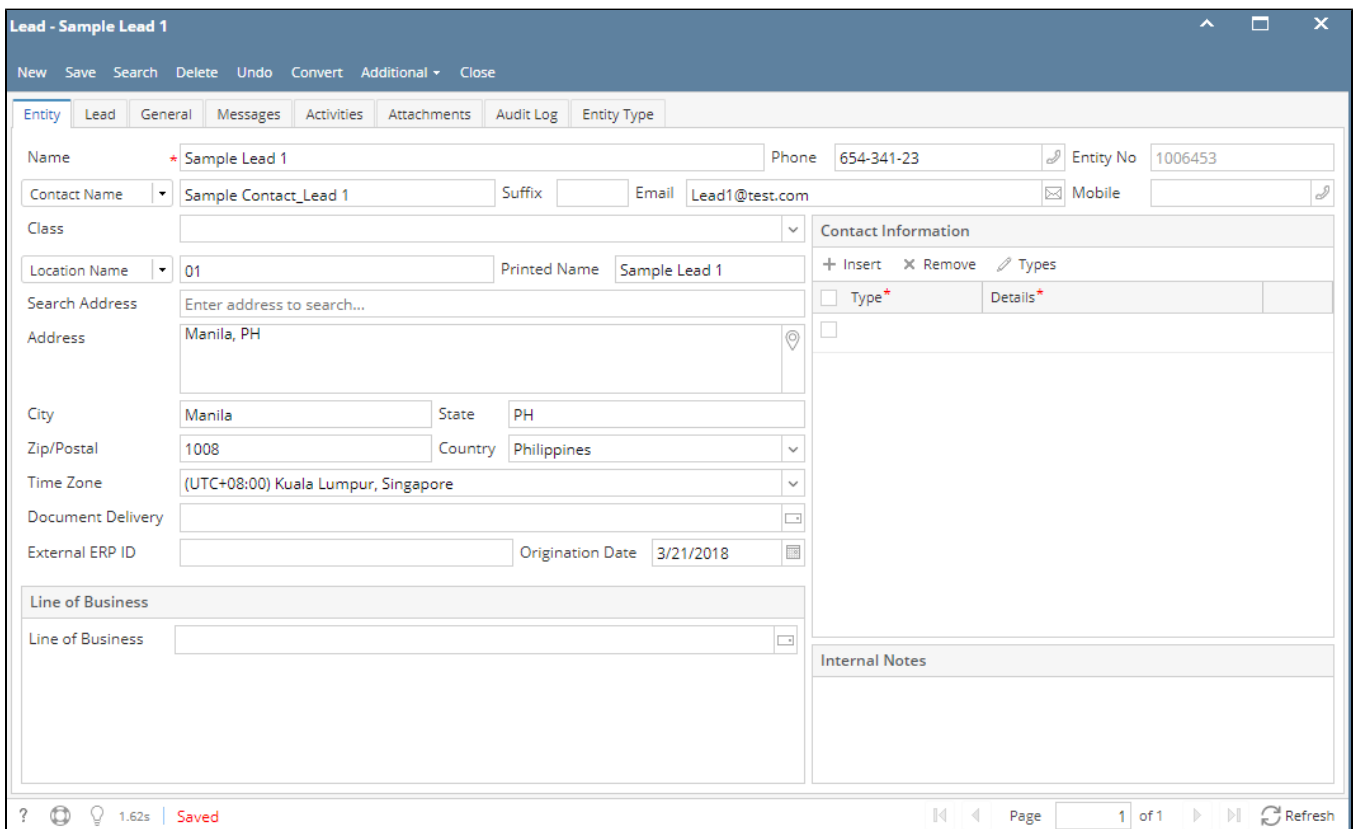
3. Provide Lead details then click **Find Duplicates** button. Duplicate Entities screen will appear, click **Add** button to proceed.

4. Once entity screen appears, provide the required fields.

5. To add Lead Source, go to Lead tab.

6. Select from Source drop down (user can add Lead Source by clicking the Source hyperlink)

7. Click **Save** button to create Lead.



The screenshot shows the 'Lead - Sample Lead 1' screen with various fields for creating a lead. The fields are organized into sections: Contact Information, Address, and Line of Business. The Contact Information section includes Name, Phone, Email, and Mobile. The Address section includes Location Name, Search Address, Address, City, State, Zip/Postal, and Country. The Line of Business section includes Line of Business. The screen also has a toolbar with buttons like New, Save, Search, Delete, Undo, Convert, and Additional. The bottom status bar shows '1.62s | Saved' and 'Page 1 of 1'.

Contact Information

Name: Sample Lead 1 Phone: 654-341-23 Entity No: 1006453

Contact Name: Sample Contact_Lead 1 Suffix: Email: Lead1@test.com Mobile:

Address

Location Name: 01 Printed Name: Sample Lead 1

Search Address: Enter address to search...

Address: Manila, PH

City: Manila State: PH

Zip/Postal: 1008 Country: Philippines

Time Zone: (UTC+08:00) Kuala Lumpur, Singapore

Document Delivery:

External ERP ID: Origination Date: 3/21/2018

Line of Business

Line of Business:

Internal Notes