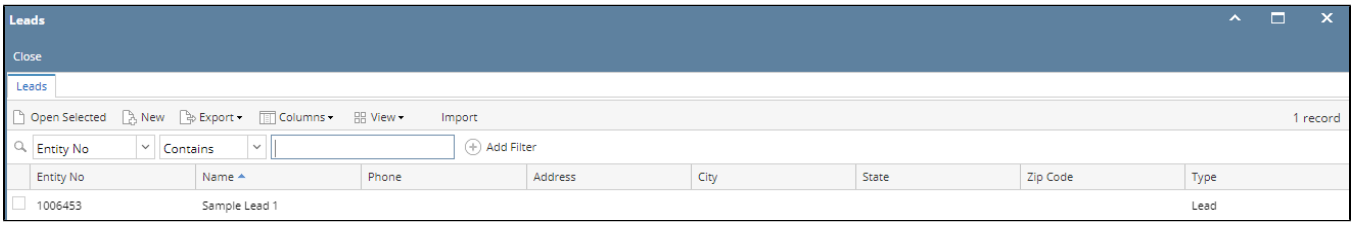
Create Lead

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

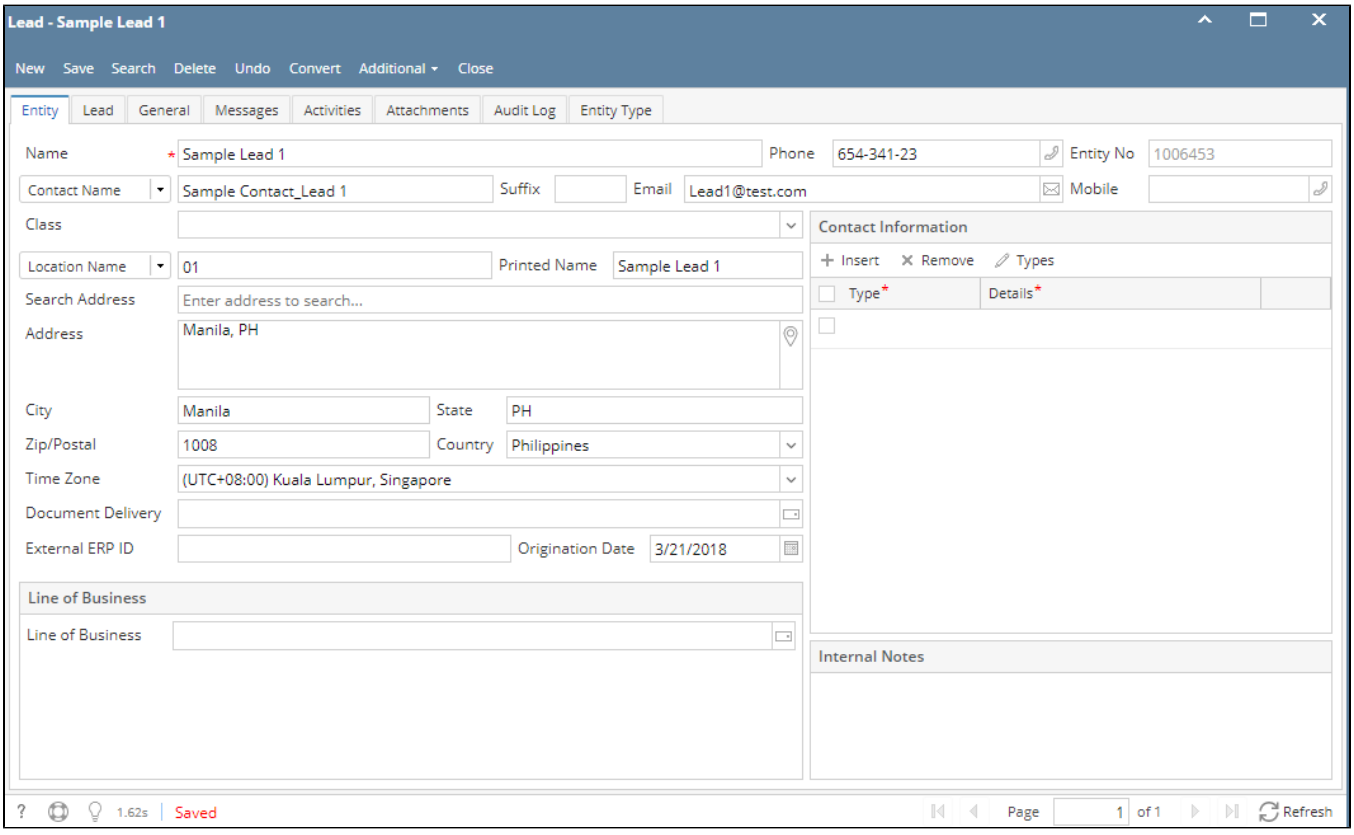


2. Click **New** toolbar button. Create New Entity screen will appear.

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.