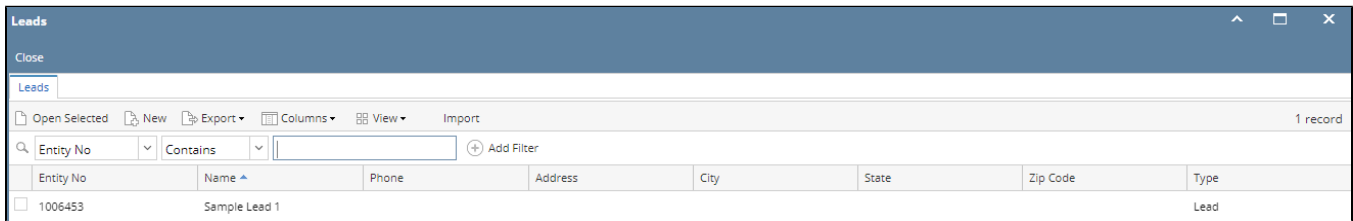


Create Lead

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



The screenshot shows the 'Leads' screen in a CRM application. At the top, there's a 'Close' button. Below it, a toolbar contains 'Open Selected', 'New', 'Export', 'Columns', 'View', and 'Import'. A search bar is present with 'Entity No' selected and 'Contains' as the operator. A table below shows one record: '1006453' with 'Sample Lead 1' as the name and 'Lead' as the type.

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

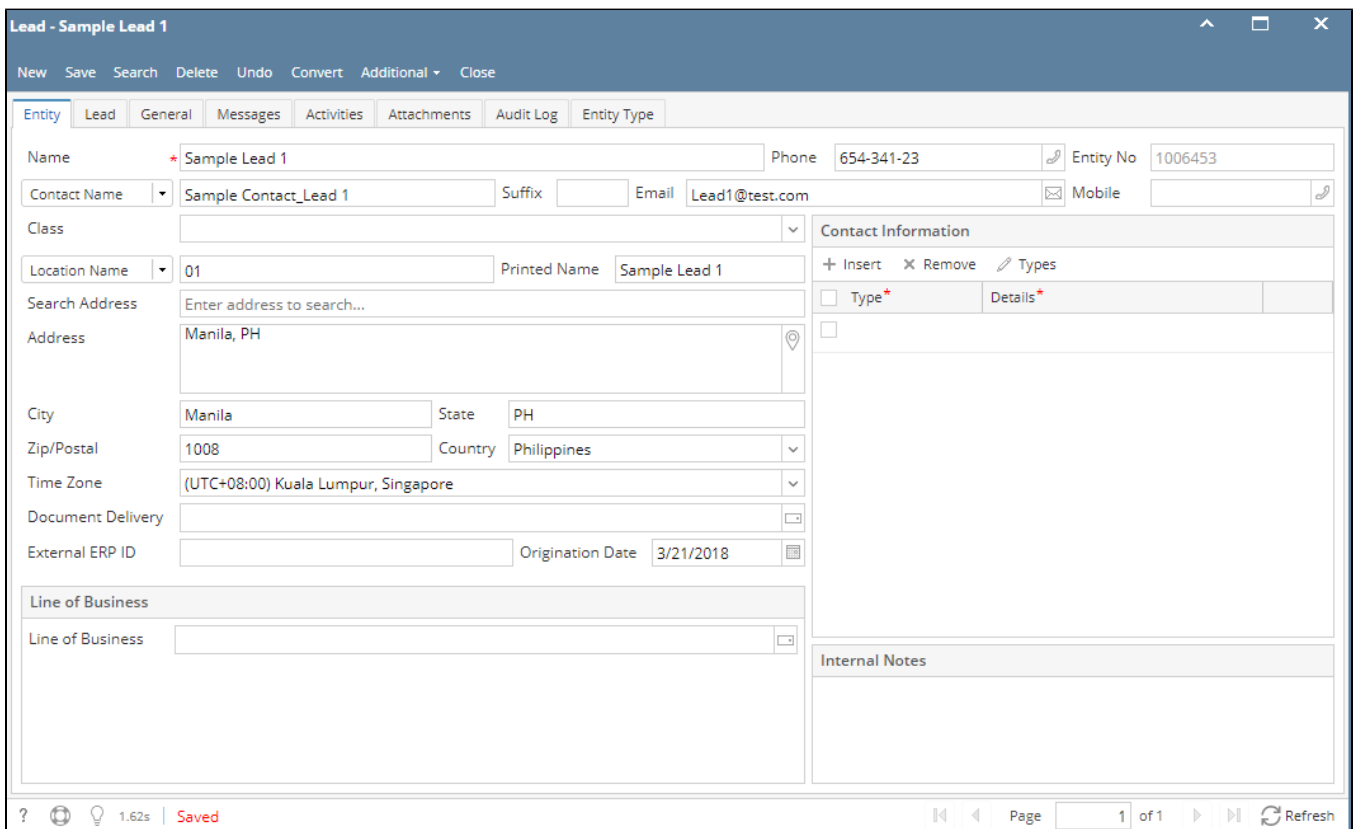
3. Provide Lead details then click **Find Duplicates** button. Duplicate Entities screen will appear, click **Add** button to proceed.

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. It has a top bar with 'New', 'Save', 'Search', 'Delete', 'Undo', 'Convert', 'Additional', and 'Close'. Below this is a tabbed interface with 'Entity' selected. The form contains various fields: 'Name' (Sample Lead 1), 'Phone' (654-341-23), 'Entity No' (1006453), 'Contact Name' (Sample Contact_Lead 1), 'Email' (Lead1@test.com), 'Mobile', 'Class', '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', and 'Internal Notes'. A 'Contact Information' section on the right includes 'Type' and 'Details' tabs. The bottom status bar shows '1.62s | Saved' and a 'Page 1 of 1' indicator with a 'Refresh' button.