Lead Setting

- Lead Source
- Pipeline
- Deal Agent
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Lead Source

Overview of Lead Source Tab

This tab displays a list of all configured lead sources and provides options to add new ones, as well as edit or delete existing lead sources.

1. Add New Lead Source Button

- **Purpose:** To create a new lead source.
- **How to Use:** Click the green "+ Add New Lead Source" button to open the "Add Lead Source" modal window.

2. Lead Source List

This section lists all the lead sources currently defined in your system.

- **#:** Displays the serial number for each lead source.
- **Name:** Displays the name of the lead source (e.g., "Email", "Google", "Facebook", "Friend", "Direct", "Tv").
- **Action:** This column contains options to manage each individual lead source:
  - **Edit:** Click the "Edit" button to open the "Add Lead Source" modal, pre-filled with the selected lead source's details, allowing you to modify it.
  - **Delete:** Click the "Delete" button to remove a lead source from the list. This usually prompts for confirmation before deletion.

Add Lead Source Modal User Manual

This section explains how to use the "Add Lead Source" modal window, which appears when you click "+ Add New Lead Source" or "Edit" an existing lead source.

Overview of "Add Lead Source" Fields

The modal contains one mandatory field for defining the new lead source. Fields marked with a red asterisk (*) are mandatory.

1. Lead Source*

- **Purpose:** The name of the source from which a lead originates (e.g., "Website", "Referral", "Cold Call", "Social Media Campaign").
- **How to Fill:** Type the desired name for the new lead source into this text field.

Actions within the Modal

- **Close (X icon):** Click the 'x' icon in the top right corner of the modal window to close it without saving.
- **Close:** Click the "Close" button to close the modal window without adding a new lead source.
- **Save:** Click the green "Save" button to add the new lead source to your system. If the mandatory "Lead Source" field is left blank, you will receive an error message prompting you to complete it.

Pipeline

Overview of Pipeline Tab

This tab allows you to view existing pipelines, add new ones, and define or manage the "Deal Stages" within each pipeline.

Top Action Buttons:

1. Add New Pipeline Button

- **Purpose:** To create a new sales pipeline (e.g., "New Client Pipeline", "Product X Sales Funnel").
- **How to Use:** Click the green "+ Add New Pipeline" button to open the "Add New Pipeline" modal window.

2. Add New Deal Stage Button

- **Purpose:** To create a new stage within a selected pipeline (e.g., "Initial Contact", "Proposal Sent").
- **How to Use:** Click the green "+ Add New Deal Stage" button to open the "Add New Deal Stage" modal window.

Pipeline List:

This section displays a list of your sales pipelines.

- **Pipeline Name (Example):** `Sales Pipeline` (with a blue icon next to it, possibly indicating an active or default pipeline).
- **Number of Deal Stages (Example):** `7 Deal Stages` (indicating how many stages are defined within this pipeline).
- **Default Status:** A green "Default" icon indicates which pipeline is set as the default for new deals/leads.
- **Deal Stages Button:**
    - **Purpose:** To view and manage the individual stages within that specific pipeline.
    - **How to Use:** Click the "Deal Stages" button. This action expands the view to show the list of deal stages for the selected pipeline, along with options to edit or delete them.

Deal Stages List (Expanded View):

When you click the "Deal Stages" button for a pipeline, the following list appears:

- **#:** Displays the serial number for each deal stage.
- **Deal Stage:** Displays the name of the deal stage (e.g., "Generated", "Qualified", "Initial Contact"). Each stage also has a colored dot next to it, indicating its associated `Label Color`.
- **Default Deal Stage:** A radio button column. One stage can be set as the `Default` stage for newly created deals within this pipeline.
  - **Green "Default" icon:** Indicates the currently selected default deal stage.
  - **Radio button:** Click to set a different stage as the default.
- **Action:** This column contains options to manage each individual deal stage:
  - **Edit:** Click the "Edit" button to open the "Add New Deal Stage" modal, pre-filled with the selected stage's details, allowing you to modify it.
  - **Delete:** Click the "Delete" button to remove a deal stage from the list. This usually prompts for confirmation before deletion.

Add New Pipeline Modal User Manual

This section explains how to define a new sales pipeline. This modal appears when you click "+ Add New Pipeline".

Overview of "Add New Pipeline" Fields

Fields marked with a red asterisk (*) are mandatory.

1. Name*

- **Purpose:** The name of the new sales pipeline (e.g., "SMB Sales", "Enterprise Deals", "Renewal Pipeline").
- **Example:** `e.g. In Progress`
- **How to Fill:** Type the desired name for your new pipeline.

2. Label Color*

- **Purpose:** To assign a visual color to the pipeline, which can help in distinguishing pipelines in reports or dashboards.

- **Current Setting (Example):** `#16B13D` (green hex code) and a green color swatch.
- **How to Change:** You can directly type a hex color code, or click the colored swatch to open a color picker and select a color visually.

Actions within the "Add New Pipeline" Modal

- **Save:** Click the green "Save" button to create the new pipeline.
- **Close:** Click the "Close" button to close the modal without saving.
- **Close (X icon):** Click the 'x' icon in the top right to close.

Add New Deal Stage Modal User Manual

This section explains how to define a new stage within a sales pipeline. This modal appears when you click "+ Add New Deal Stage" or "Edit" an existing deal stage.

Overview of "Add New Deal Stage" Fields

Fields marked with a red asterisk (*) are mandatory.

1. Pipeline*

- **Purpose:** To select the specific sales pipeline to which this new deal stage will belong.
- **Current Selection (Example):** `Nothing selected`
- **How to Select:** Click the dropdown menu and choose the pipeline where you want to add or edit this stage.

2. Deal Stage*

- **Purpose:** The name of the specific stage within the pipeline (e.g., "Discovery", "Qualification", "Negotiation", "Closed Won", "Closed Lost").
- **Example:** `e.g. In Progress`
- **How to Fill:** Type the desired name for the deal stage.

3. Label Color*

- **Purpose:** To assign a visual color to the deal stage, which can help in quickly identifying the status of deals on a pipeline board.
- **Current Setting (Example):** `#16B13D` (green hex code) and a green color swatch.
- **How to Change:** You can directly type a hex color code, or click the colored swatch to open a color picker and select a color visually.

Actions within the "Add New Deal Stage" Modal

- **Save:** Click the green "Save" button to create the new deal stage or update the existing one.
- **Close:** Click the "Close" button to close the modal without saving.
- **Close (X icon):** Click the 'x' icon in the top right to close.

Deal Agent

Overview of Deal Agent Tab

This tab displays a list of users designated as deal agents and provides options to add new ones, along with their assigned categories and status.

1. Add New Deal Agent Button

- **Purpose:** To designate a new user as a deal agent.
- **How to Use:** Click the green "+ Add New Deal Agent" button to open the "Add New Deal Agent" modal window.

2. Deal Agent List

This section lists all the users currently configured as deal agents in your system.

- **#:** Displays the serial number for each deal agent.
- **Name:** Displays the name of the user who is a deal agent.
- **Category:** Shows the deal category(ies) assigned to the agent.
- **Status:** The current status of the deal agent (e.g., Active).
- **Action:** This column would typically contain options to manage each individual deal agent, such as:
  - **Edit:** An "Edit" button or icon to modify an existing agent's settings.
  - **Delete:** A "Delete" button or icon to remove an agent from the list. This would usually trigger a confirmation prompt.
- **Current Status:** "No lead agent added." indicates that no deal agents have been designated yet.

Add New Deal Agent Modal User Manual

This section explains how to use the "Add New Deal Agent" modal window, which appears when you click "+ Add New Deal Agent".

Overview of "Add New Deal Agent" Fields

The modal contains two mandatory fields for assigning a user as a deal agent and associating them with deal categories. Fields marked with a red asterisk (*) are mandatory.

1. Choose Agents*

- **Purpose:** To select an existing user from your system who will be designated as a deal agent.
- **Current Selection (Example):** `Adam Harith` (with "It's you" indicating this user is currently logged in).
- **How to Select:** Click the dropdown menu and select the user you wish to assign as a deal agent.

2. Deal Category*

- **Purpose:** To assign the selected deal agent to one or more specific deal categories. This helps in routing leads or deals to the appropriate agent.
- **Current Selection (Example):** `Nothing selected`
- **How to Select:** Click the dropdown menu and select the deal category(ies) you want to associate with this agent.

Actions within the Modal

- **Cancel:** Click the "Cancel" button to close the modal window without saving the new deal agent.
- **Save:** Click the green "Save" button to add the selected user as a deal agent. If mandatory fields are left blank, you will receive an error message prompting you to complete them.
- **Close (X icon):** Click the 'x' icon in the top right corner of the modal window to close it without saving, similar to the "Cancel" button.

Deal Category

Overview of Deal Category Tab

This tab displays a list of all configured deal categories and provides options to add new ones, as well as edit or delete existing categories.

1. Add New Deal Category Button

- **Purpose:** To create a new category for your deals.
- **How to Use:** Click the green "+ Add New Deal Category" button to open the "Add New Deal Category" modal window.

2. Deal Category List

This section lists all the deal categories currently defined in your system.

- **#:** Displays the serial number for each deal category.
- **Category Name:** Displays the name of the deal category.
- **Action:** This column would typically contain options to manage each individual deal category, such as:
  - **Edit:** An "Edit" button or icon to modify an existing category's name.
  - **Delete:** A "Delete" button or icon to remove a category from the list. This would usually trigger a confirmation prompt.
- **Current Status:** "No record found." indicates that no deal categories have been added yet.

Add New Deal Category Modal User Manual

This section explains how to use the "Add New Deal Category" modal window, which appears when you click "+ Add New Deal Category".

Overview of "Add New Deal Category" Fields

The modal contains one mandatory field for defining the new deal category. Fields marked with a red asterisk (*) are mandatory.

1. Category Name*

- **Purpose:** The name of the new category you want to create for your deals (e.g., "Software", "Hardware", "Service Contract", "Renewal").
- **How to Fill:** Type the desired name for the new deal category into this text field.

Actions within the Modal

- **Close (X icon):** Click the 'x' icon in the top right corner of the modal window to close it without saving.
- **Close:** Click the "Close" button to close the modal window without adding a new deal category.
- **Save:** Click the green "Save" button to add the new deal category to your system. If the mandatory "Category Name" field is left blank, you will receive an error message prompting you to complete it.

Round Robin

Overview of Round Robin Tab

This tab allows you to enable or disable the Round Robin lead assignment method and provides informative details on its functionality.

1. Round Robin Toggle

- **Purpose:** To enable or disable the Round Robin feature for automatic lead assignment.
- **How to Use:** Click the toggle switch.
  - **Enabled (Green/Right position):** Round Robin lead assignment is active.
  - **Disabled (Gray/Left position):** Round Robin lead assignment is inactive.

2. Information Section

This section provides a clear explanation of the Round-Robin Method:

- **Round-Robin Method:**
  - **Equal Distribution:** "Tasks are evenly distributed among team members."
  - **Sequential Assignment:** "Each task is assigned to the next team member in order."
  - **Fair Rotation:** "Ensures balanced workloads and prevents overload."
- **Example:**
  - "Leads go to Agent A, then B, then C, and repeat."
  - "In a customer support system, incoming leads are assigned in a round-robin fashion. The first lead goes to Agent A, the second to Agent B, the third to Agent C, and the fourth back to Agent A, continuing in this pattern."
- **Benefit:**
  - "Using the round-robin method ensures fair and efficient task distribution, promotes balanced workloads, and streamlines resource allocation."

Important Note: While a "Save" button is not explicitly visible in this specific screenshot (it's likely off-screen or the changes save automatically upon toggling), ensure your changes are saved for them to take effect.