Complete Guide to Lead Management

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The full user manual for capturing, assigning, following up, and converting leads in the CRM - from first enquiry to closed deal.

CRM & Leads › Complete Guide to Lead Management

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1. Introduction

A lead is any person who shows interest in one of your properties - through your website, a WhatsApp message, a phone call, a walk-in, or a referral. Lead Management is where you capture every enquiry, assign it to the right team member, follow up on time, schedule site visits, and finally convert the enquiry into a booking. This guide walks you through the whole journey in plain language.

[Screenshot: Lead Dashboard]

2. Purpose of Lead Management

Lead Management helps you:

* Never miss an enquiry - every source funnels into one place.
* Assign leads to the right staff quickly.
* Track every conversation, call, and site visit in a single timeline.
* Schedule follow-up reminders so no lead goes cold.
* Measure conversion - from enquiry to won deal.

3. Lead Dashboard

Open Admin › CRM › Leads to reach the dashboard. You will see:

Lead Overview - headline counts for New, Contacted, Follow-up, Site Visit, Won, and Lost.

Lead List - every lead with name, phone, source, status, assigned staff, and next follow-up date.

Search - free-text search across name, phone, email, and notes.

Filters - narrow by source, status, city, priority, assigned staff, and date range.

Sorting - click any column header to sort by newest, priority, or next follow-up.

Bulk Actions - select multiple leads to reassign, change status, tag, or export.

[Screenshot: Lead List with filters]

4. Creating a Lead (Step-by-Step)

1. Go to Admin › CRM › Leads and click + Add Lead.
2. Enter the Contact Details - name and mobile number are mandatory.
3. Pick the Lead Source (Website, WhatsApp, Walk-in, etc.).
4. Choose the Lead Type - Buy, Rent, Home Loan, Interior, or Other.
5. Enter the Requirements - budget, city, locality, category, type, purpose.
6. Optionally link an Interested Property from your listings.
7. Set Priority and a Follow-up Date.
8. Assign the lead to a staff member.
9. Add opening Notes and any Attachments (e.g. floor plan).
10. Click Save - the assigned staff gets an instant notification.

[Screenshot: Add Lead form]

5. Field-by-Field Explanation

Contact

Lead Name (required) - full name of the enquirer.

Mobile Number (required) - 10-digit Indian mobile; used for calls, WhatsApp, and duplicate detection.

Email Address (optional) - used for email follow-ups and brochure sharing.

Classification

Lead Source (required) - where the enquiry came from. See Lead Sources.

Lead Type (required) - Buy, Rent, Home Loan, Interior, Site Visit, Other.

Priority (optional) - Low, Medium, High, Hot. Drives sorting and dashboard alerts.

Requirements

Budget - expected price range in rupees. Enter min and max.

Interested Property (optional) - link to a property from your CRM listings.

Preferred City (recommended) - helps route to the right city admin.

Preferred Locality (recommended) - narrows matching listings.

Property Category - Residential or Commercial.

Property Type - Apartment, Villa, Plot, Office, etc.

Purchase Purpose - Self-use, Investment, Rental income.

Requirements - free-form notes such as "3 BHK, Vastu, parking for 2 cars".

Workflow

Assigned Staff (required) - the person responsible for this lead.

Follow-up Date (recommended) - next action date; drives reminders.

Notes - a running log of every conversation.

Attachments (if enabled) - brochures, ID copies, chat screenshots.

6. Lead Sources

* Website - auto-captured from your public site’s enquiry forms.
* Manual Entry - added by staff after a personal conversation.
* Referral - from an existing customer or partner.
* Walk-in - visitor at your office.
* Phone Call - inbound call to your city number.
* WhatsApp - chat enquiry from your website or catalogue.
* Social Media - Facebook, Instagram, YouTube, LinkedIn.
* Property Portals - MagicBricks, 99acres, Housing.com, etc.
* Other - anything not covered above.

Choosing the correct source powers your Source Performance report so you know which channels actually convert.

7. Lead Status Explained

8. Lead Assignment

Assigning leads - while creating or editing a lead, pick the responsible staff from the Assigned Staff dropdown. Only staff with the Leads permission appear.

Reassigning - open the lead and change the assignee, or use Bulk Actions to reassign many leads at once.

Ownership - the assigned staff sees the lead in their personal queue; other staff see it only if the Super Admin allows shared visibility.

Notifications - the new owner receives an in-app notification, a bell alert, and (if enabled) a sound + vibration on mobile.

9. Follow-ups

Creating follow-ups - inside a lead, click + Follow-up, choose a date/time, and add a short note ("Send brochure", "Call after 6 PM").

Follow-up reminders - bell notifications fire before and at the scheduled time. Staff on mobile also hear the notification sound.

Notes - every follow-up creates a permanent timeline entry with who did what and when.

Activity history - the lead detail page shows the full timeline: created → contacted → follow-ups → visits → status changes.

Missed follow-ups - appear in a dedicated red "Overdue" strip on the dashboard so nothing slips.

[Screenshot: Follow-up timeline]

10. Site Visits

Scheduling a site visit - from a lead, click Schedule Visit, pick date/time, property, and attendees.

Assigning staff - one or more staff members can be tagged to accompany the buyer.

Updating visit status - Scheduled → Started → Completed / Not Done → Rescheduled.

Recording feedback - after the visit, the staff logs the buyer’s reaction and next steps. All reports are visible to the lead owner and Super Admin.

Next actions - the visit outcome automatically suggests the next lead status (e.g. Completed → Negotiation).

[Screenshot: Site Visit modal]

11. Lead Conversion

A healthy pipeline moves leads from left to right:

New → Contacted → Follow-up → Site Visit → Negotiation → Won

Best practices for accurate pipeline reporting:

* Change the status the moment a real event happens - not at the end of the day.
* Log the reason when marking a lead Lost. Reasons feed the Lost Analysis report.
* On Won, record deal value; this powers your revenue dashboard.
* Move fully closed deals to Closed monthly to keep active views clean.

12. CRM Integration

13. Best Practices

* Respond within 5 minutes to new website leads - response time is the single biggest factor in conversion.
* Record complete information - budget, city, and locality are the minimum for matching listings.
* Update lead stages regularly - accurate stages make dashboards trustworthy.
* Schedule follow-ups every time before closing a lead detail page - no lead should exist without a next step.
* Maintain honest notes - future staff (and your future self) rely on them.

14. Tips & Recommendations

* Turn on notification sound in the bell menu - you’ll never miss a hot lead again.
* Use Priority: Hot for buyers ready to close within 30 days.
* Send a brochure PDF via WhatsApp right after the first call.
* Use Bulk Actions to reassign leaves-of-absence workloads.
* Review the Overdue Follow-ups strip first thing every morning.

15. Common Mistakes

* Forgetting to set a follow-up date - the lead drops off everyone’s radar.
* Assigning a lead to the wrong city admin.
* Creating a duplicate lead when the same phone already exists.
* Missing mobile number - a lead without a phone can’t be worked.
* Leaving stale Follow-up status weeks after the buyer went cold.
* Marking Won without capturing deal value.

16. Troubleshooting

Why can’t I see a lead? The lead is probably assigned to another staff member. Ask your Super Admin to check visibility or reassign it to you.

Why wasn’t I notified? Confirm the lead is assigned to you and that notifications are turned on. On mobile, enable sound and vibration in the bell menu.

Why is the lead assigned to someone else? Either it was reassigned in Bulk Actions or an admin round-robin rule sent it there. Check the lead’s activity history.

Why isn’t my follow-up appearing? Verify the follow-up date is in the future and that you clicked Save. Reload the lead if needed.

Why isn’t the site visit showing? Site Visits appear under the assigned staff’s calendar. If you scheduled it for someone else, they see it, not you.

Why can’t I edit a lead? Only the assigned staff and admins can edit. Ask your Super Admin to grant the Leads permission.

17. Frequently Asked Questions

Q. Are duplicate leads detected automatically? Yes - the CRM warns if a lead with the same phone already exists.

Q. Can I import leads in bulk? Yes. Use Add Lead › Bulk Upload and upload a CSV or Excel file. A mapping screen lets you match columns to fields.

Q. Who can delete a lead? Only the Tenant Super Admin. Deletion is permanent and audit-logged.

Q. Can two staff work the same lead? Only one is the owner, but co-workers can be tagged on site visits and can add notes if given shared visibility.

Q. Which phone number reaches the buyer for callbacks? The city-specific number set in Admin › Cities, so leads always see a local number.

Q. Do website enquiries create leads instantly? Yes. Every form submission - property enquiry, Schedule Visit, Home Loan, Interior - creates a lead with the correct source and type.

Q. Can I export my leads? Yes. Use the export button on the Lead List to download a CSV of the current filter.

18. Related Articles

* Property Management
* Site Visits

* Staff Management
* Notifications
* Reports