





How to add a new Lead

Procedure

- To add a new lead, click on "Leads" on the side navigation bar under the heading "SQLWorks CRM".
- 2. Click on "New" on the bar along the top.
- 3. Fill in all of the information that you have about the new lead including, contact information and what they are interested in.
- 4. Assign the lead to a member of staff my clicking the box next to "Assigned to" at the top and select the staff member from the drop down list.
- 5. Click "Save & Close" to save the new Lead.

