

Leads and opportunities

Selling and customers

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Capture enquiries, follow them up, and turn them into quotations and customers.

Beginner · About 15 minutes · Version 1.0 · Updated 17 November 2026

Plan availability

Included in the **Enterprise** plan. Contact us if you want to upgrade.

Overview

A **Lead** is someone who might buy from you. An **Opportunity** is a lead with a real chance of becoming a sale. Tracking them in one place means no enquiry is forgotten.

The Lead list, showing leads with statuses such as Open, Replied and Opportunity.

Prerequisites

The **CRM** module is included in your plan. Check your sidebar for **CRM**.

Steps

Record a lead

1. Open **CRM**, then **Lead**, and click **Add Lead**.
2. Enter the person's name, the **Organization Name**, their phone and email, and the **Source** (for example *Walk In* or *Campaign*).
3. Choose the **Territory** and **Status**.
4. Click **Save**.
5. Log each conversation: scroll to **Activity** and add a **Comment**, or send an **Email**.

Turn a lead into an opportunity

1. Open the lead and click **Create**, then **Opportunity**.
2. Enter what they want, the expected amount and schedule the next follow-up from the **Activities** tab (a **To Do** or **Event** with a date).
3. Click **Save**.

Make a quotation and a customer

1. In the opportunity, click **Create**, then **Quotation**. The lead becomes a customer when you confirm.
2. Continue as in From quotation to payment.

Practical example

Atieno Homes Ltd phones about 50 sheets of roofing. The salesperson records a lead, creates an opportunity worth KES 62,500, and schedules a follow-up for next Monday. On Monday a reminder appears, she calls, and creates a quotation.

Important notes

- Use the **Status** to see your pipeline at a glance: Open, Replied, Opportunity, Converted, Lost.
- Scheduling the next follow-up keeps leads warm. Without it, leads go cold.

Common mistakes

- Creating a customer straight away for a casual enquiry. Start with a lead.
- Not recording why an opportunity was lost. Use the **Lost** reason so you can learn from it.

Next steps

Read From quotation to payment.

Related documentation

- From quotation to payment
- Creating and managing customers