



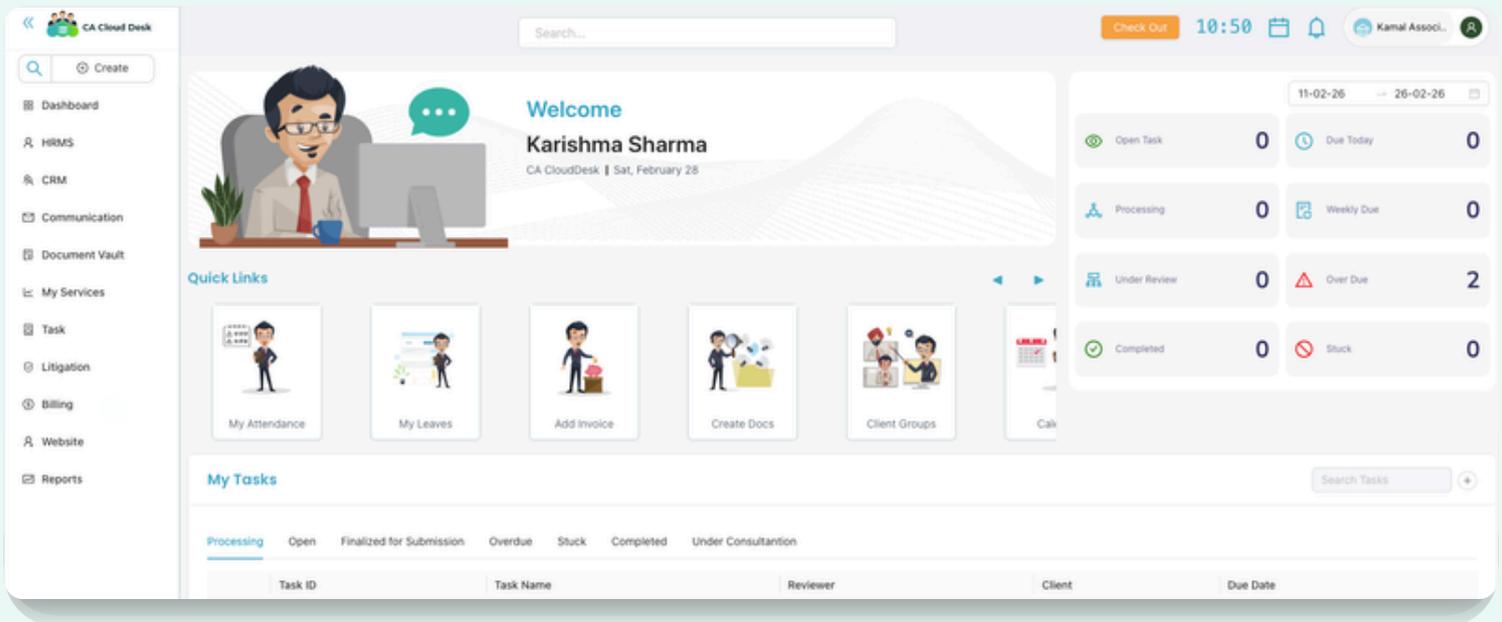
# Lead Management

## CA CloudDesk



## Step 1: Login

Log in to your CA CloudDesk account using your credentials.



The screenshot shows the CA CloudDesk dashboard for user Karishma Sharma. The dashboard includes a search bar, a navigation menu on the left, a welcome message, quick links for attendance, leaves, invoices, documents, and client groups, and a task management section. The task management section shows a table with columns for Task ID, Task Name, Reviewer, Client, and Due Date. The task status is currently set to 'Processing'.

Task ID	Task Name	Reviewer	Client	Due Date

## Step 2: Open Lead Management

After logging in, scroll to the footer section of the dashboard and click on Lead Management.

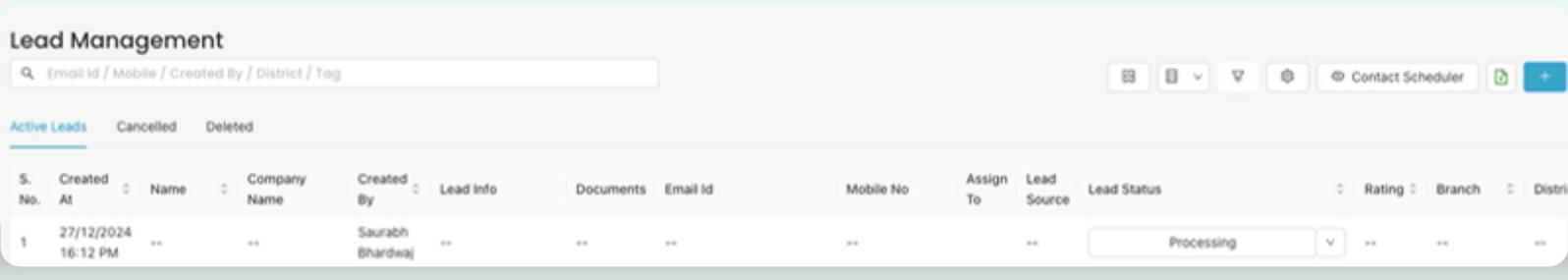


### Step 3: Lead Categories



In the Lead Management section, you will see three lead categories:

- Active Leads
- Cancelled Leads
- Deleted Leads



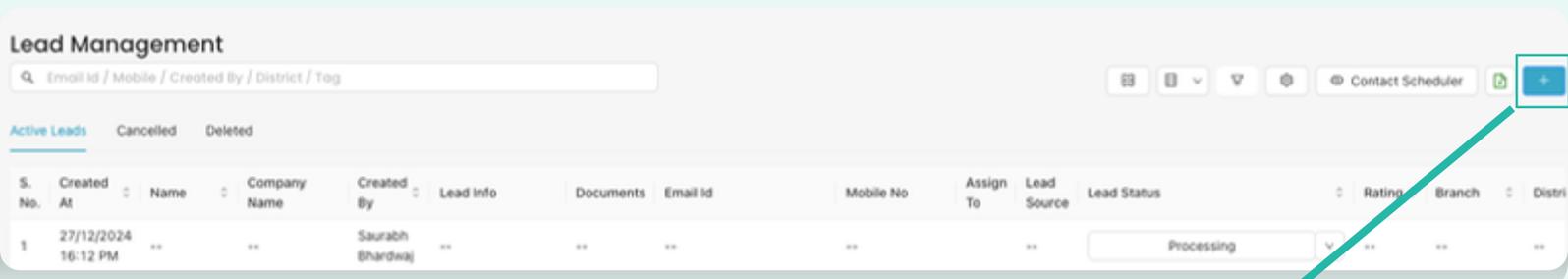
### Step 4: Add a New Lead

In the Lead Management section, you will see three lead categories:

- Active Leads
- Cancelled Leads
- Deleted Leads



To create a new lead, click on the "+" (Plus) icon available on the top right side of the page.



Add Leads

## Step 5: Enter Lead Information

Fill in the required lead details such as:

- Name
- Company Name
- Mobile Number
- Email ID
- Lead Status
- Rating



**Add Lead** View Lead

Lead Information	<input type="text" value="Lead information"/>
Name*	<input type="text" value="Name"/>
Company Name	<input type="text" value="Company Name"/>
Mobile No*	<input type="text" value="Mobile No"/>
Email ID	<input type="text" value="Email ID"/>
Lead Status	<input type="text" value="Lead Status"/>
Rating	☆☆☆☆

[More info](#)

More Info

## Step 6: Additional Information

Click on More Info to add additional details such as:

- Address
- Service
- Country
- State
- District
- Pincode
- Description
- Attachments (if required)



Branch\* Bluemon Wealth Management

Lead Source

Assign To

Annual Revenue

Website

Address

Service Select Service

Country INDIA

State

District

Pincode

Description

Paragraph B I                  

0 words

+ Add Attachment

Less info Submit Cancel

## Step 7: Save the Lead

After entering all the necessary information, click Submit to save the lead.

**COMPLETED**

