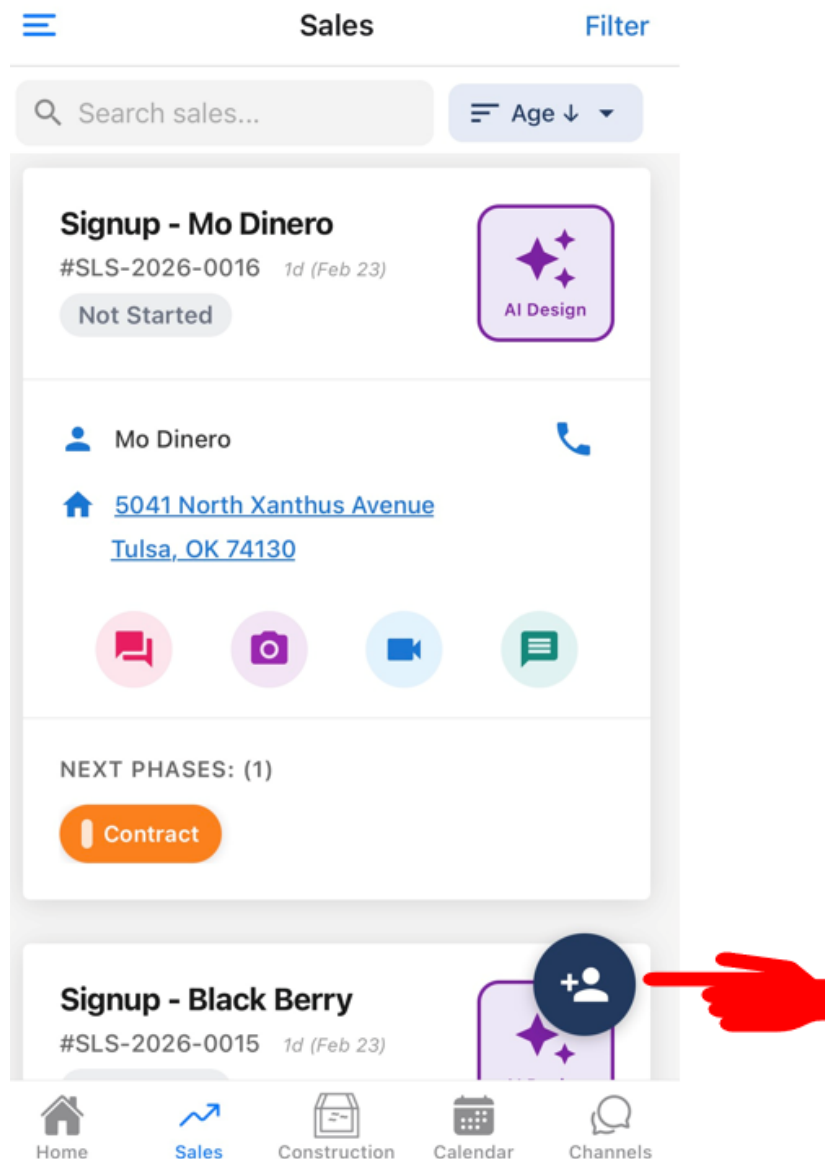
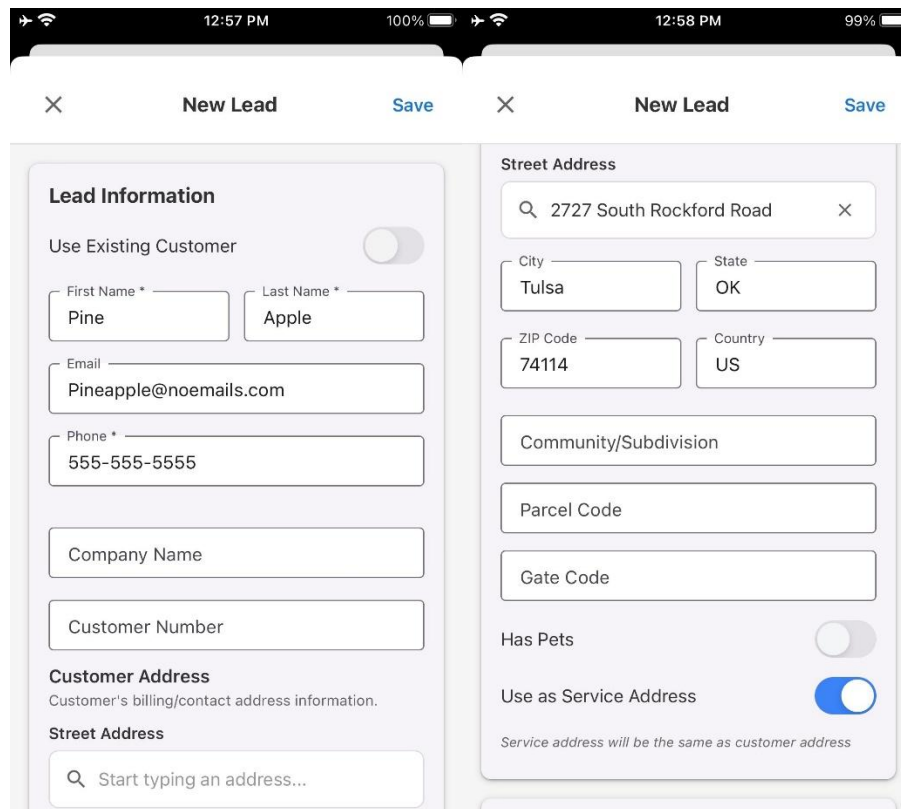


Adding Sales Leads-Mobile App

1. From the main **Sales** tab, tap the **Add Lead icon** (the blue circle with a person and a "+" sign located in the bottom right corner of the screen).



2. Enter Lead Information



- **Name:** Enter the **First Name** and **Last Name**.
Email: Provide a valid email address.
Phone: Enter the primary contact number.
Company/Customer Number: (Optional) Add these if the lead is associated with a specific business or existing account.
Add Customer Address
Search Address: Start typing the address in the search bar to auto-populate the fields, or manually enter the **City**, **State**, and **ZIP Code**.
Property Details: (Optional) Fill in the **Community/Subdivision**, **Parcel Code**, or **Gate Code** if applicable.
Preferences: Toggle the **Has Pets** switch if needed. Ensure **Use as Service**
- Tap the **Save** button in the top right corner of the screen.
A "**Success**" pop-up will appear once the lead is created. Tap **OK**.
- The app will return you to the Sales list, where you can now see the new lead.