

# Leads

Create a lead

Version 8.0



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# Create a lead

PRODUCTS: [MARKETING](#) [SALES CREATIO](#)

A lead is an interest in your products expressed by a potential customer. For example, new leads emerge if new users have registered on your website or if you receive a call from a contact who was previously interested in your services. With Creatio leads, you can work both with the customers who are ready to make a deal or those who need some more time to consider a purchase.

In Creatio, a lead can be created in the following ways:

- added manually in the [ *Leads* ] section
- [imported](#) from Excel
- created automatically via registering on a [landing page](#).

**Note.** If the [ *Create contact* ] checkbox is selected for a webpage in the "Landings" section, then when a consumer fills in the form of this landing, Creatio automatically creates a lead and a contact.

Using the Leads section, you can manage the lead nurturing process from the moment a potential customer expresses an interest in your products up to the handoff to sales.

To add a lead manually:

1. Go to the [ *Leads* ] section.
2. Click the [ *New Lead* ] button.
3. Fill out the displayed mini page:
  - a. [ *Customer need* ] field. The field is required.
  - b. [ *Account name* ] field.
  - c. [ *Contact name* ] field.
  - d. [ *Email* ].
  - e. [ *Mobile phone* ] field.The fields of the record can be populated later.
4. Click the [ *Save* ] button to save the new folder (Fig. 1).

Fig. 1 Lead management process

### Lead ↗ ×

Customer need\*  
Additional service

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Account name  
Vizor

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Contact name  
Maria Nguyen

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Email  
maria@vizer.com

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Mobile phone  
+48 077 149 52 19

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**SAVE** CANCEL

As a result, a new record will be added to the [ *Leads* ] section.