



HOW TO CREATE A LEAD JOB

Go on the client page click on the Lead icon on the top bar=>Select one of the 3 options between Perm, Temp and Contract Job

The screenshot shows the 'ibistest' client page. In the top bar, there is a 'Lead' icon (a person with a magnifying glass) circled in red. A red arrow points to it. Below the top bar, there is a 'Summary' section. In the 'Summary' section, there is a dropdown menu for 'Lead' type, which is also circled in red. The dropdown menu shows three options: 'Permanent Lead', 'Temporary Lead', and 'Contract Lead'. A red arrow points to the 'Permanent Lead' option.

COMPANY INFO		CONTACT DETAILS		OWNERSHIP DETAILS	
Name	ibistest	Telephone No		Temp Cons	
Client ID	1109897	Address 1	kilburn road	Perm Cons	Laura Amin
Status	Active	City/Town		Contract Cons	Laura Amin
Parent Company		Country		Grading	
Head Office		Website		Client Bureau ID	1034605
Primary	Hotel/Lesure/Restaurant	Blacklisted			
D & B Check					

Fill all the red boxes with mandatory and required information=>Confirm

The screenshot shows the 'New Lead Perm Job' form in Internet Explorer. The form has several fields, some of which are circled in red. The fields are: 'Consultant' (circled in red), 'Client' (circled in red), 'Job Title' (circled in red), 'Job Category' (circled in red), 'Status' (circled in red), and 'Confirm' (circled in red). The 'Status' field is set to 'Verified Lead Perm'. The 'Confirm' button is at the bottom of the form.

To see all the client's lead jobs, click on=> Leads on the drop down menu

