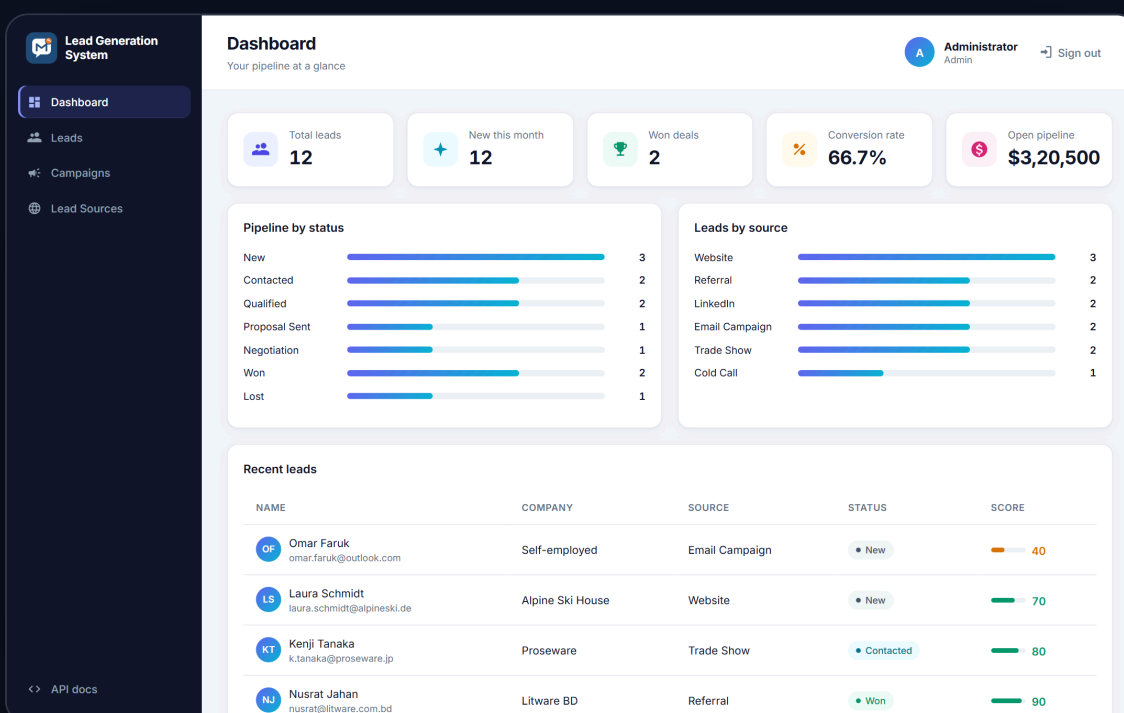




USER MANUAL

Lead Generation System

Capture, score and follow up on every lead from one place. This guide shows you how to use every screen, step by step.



VERSION

1.0.0

AUDIENCE

Sales & marketing teams, administrators

DATE

October 2026

Contents

01	Introduction	What the system does and key terms
02	Getting started	Signing in, the screen layout, signing out
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06	Lead scoring	How the 0–100 score is calculated
07	Campaigns	Tracking where leads come from
08	Lead sources	Managing channels
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10	Troubleshooting	Messages and what to do

SALES & MARKETING STAFF

Read chapters 1–8. Chapter 4 covers everyday work.

ADMINISTRATORS

Read chapter 9 to install the system, then chapter 2 to sign in for the first time.

1 Introduction

Lead Generation System helps your team collect potential customers (leads), see which ones are most promising, and track every conversation until the deal is won or lost.

What you can do

- Keep every lead's contact details, company and estimated deal value in one list.
- Move leads through a sales pipeline, from **New** to **Won** or **Lost**.
- See an automatic **score** (0–100) that shows how promising each lead is.
- Record calls, emails, meetings and notes so anyone can see the full history.
- Link leads to the **campaigns** and **sources** that brought them in.
- Watch totals, conversion rate and pipeline value on the dashboard.

Key terms

TERM	MEANING
Lead	A person who might become a customer, for example someone who filled in a website form or met you at an event.
Status	Where the lead is in your sales process: New, Contacted, Qualified, Proposal Sent, Negotiation, Won or Lost.
Score	A number from 0 to 100 that the system calculates from the lead's details. Higher means more promising.
Lead source	The channel the lead came from, such as Website, Referral or LinkedIn.
Campaign	A marketing activity with dates and a budget, such as a webinar series or trade show.
Activity	Something that happened with a lead: a call, email, meeting, note or status change.
Pipeline value	The total estimated value of all leads that are still open (not Won or Lost).

2 Getting started

The system runs in your web browser. You don't need to install anything on your own computer.

Open the system

Double-click the **Lead Generation System** shortcut on the desktop or in the Start menu, or type the address your administrator gave you (for example <http://localhost:5019>) into Microsoft Edge, Google Chrome or Firefox.

Sign in

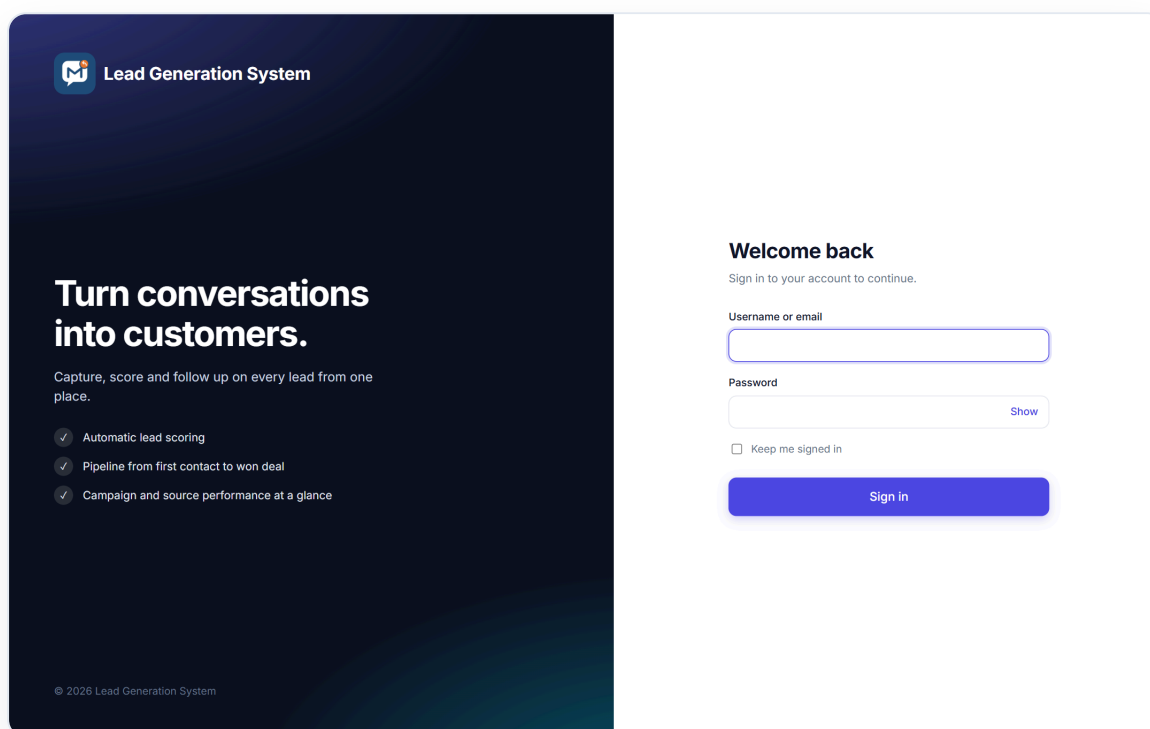


Figure 2.1 The sign-in page

- 1 Type your **username** or **email address**.
- 2 Type your **password**. Click **Show** to check what you typed.
- 3 Tick **Keep me signed in** if you're on your own computer and want to stay signed in after closing the browser.
- 4 Click **Sign in**.

YOUR FIRST SIGN-IN

The administrator account is the one created during installation (chapter 9). On a development copy the default login is username **admin**, password **Admin@123**. Change it before real use.

If the username or password is wrong, you'll see *"Invalid username or password."* For security, the message doesn't say which one was wrong.

Welcome back

Sign in to your account to continue.

Username or email

Password

 [Show](#)

☐ Keep me signed in

[Sign in](#)

Figure 2.2 Sign-in details filled in

Welcome back

Sign in to your account to continue.

Username or email

Password

 [Show](#)

☐ Keep me signed in

Invalid username or password.

[Sign in](#)

Figure 2.3 Wrong username or password

TOO MANY ATTEMPTS

After 10 failed attempts within a minute, sign-in is paused and you'll see *"Too many attempts. Please wait a minute and try again."*

The screen layout

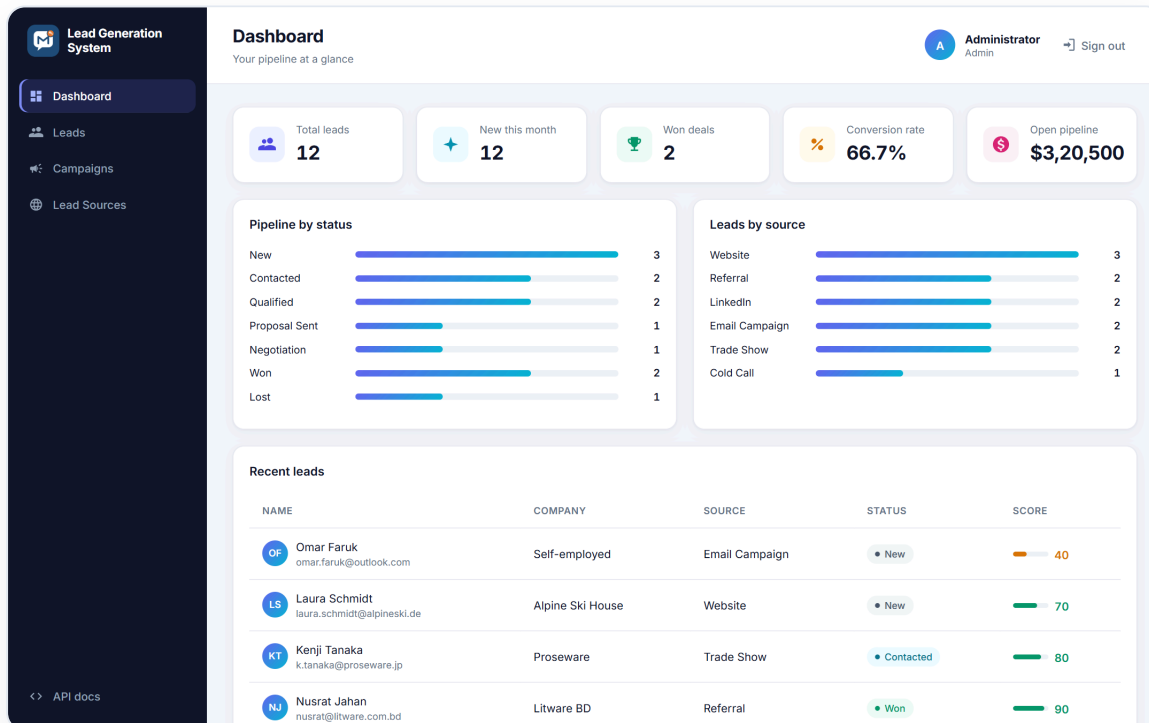


Figure 2.4 Main screen: menu on the left, page title and your account at the top

Menu (left)

Dashboard, Leads, Campaigns and **Lead Sources**. Click an item to open that page. The current page is highlighted.

Top bar

The page name and a short description on the left. Your name, role and the **Sign out** button on the right.

Using a phone or tablet

On smaller screens, the menu moves to the top and shows icons only. Everything else works the same way.

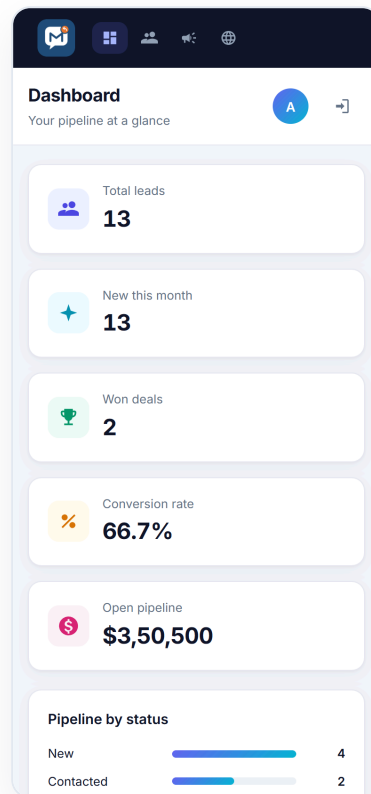


Figure 2.5 The dashboard on a phone

Sign out



Figure 2.6 Your account and the Sign out button

Click **Sign out** in the top-right corner. Always sign out on shared computers. If you don't use the system for 8 hours, you're signed out automatically (unless you ticked **Keep me signed in**).

3 Dashboard

The dashboard opens after you sign in. It summarises your whole pipeline. Click **Dashboard** in the menu to return to it at any time.

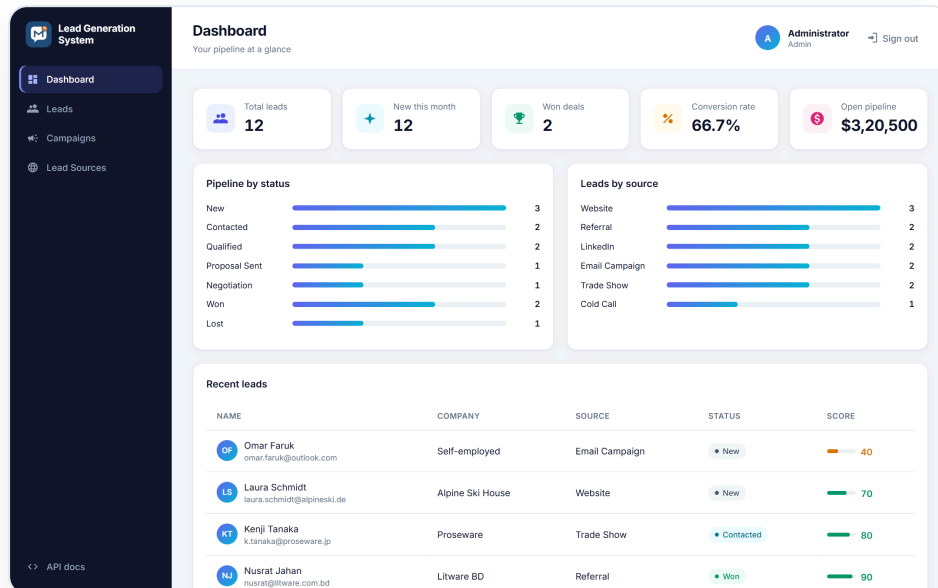


Figure 3.1 The dashboard

Summary cards

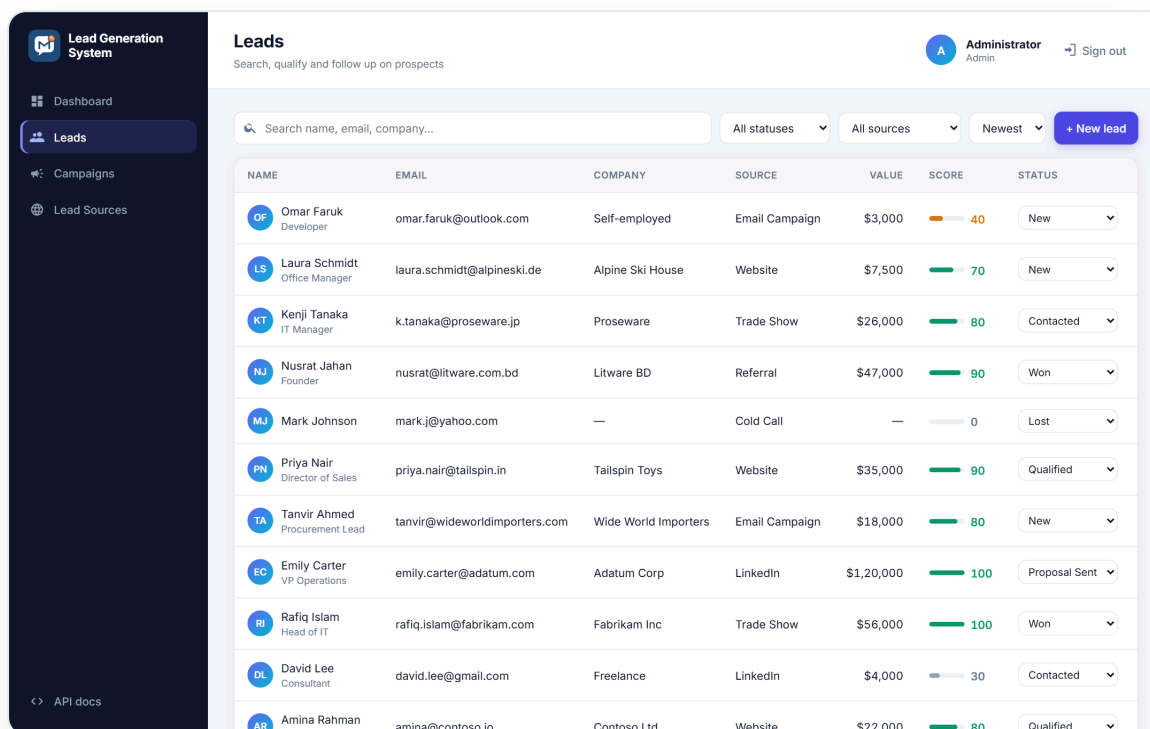
CARD	WHAT IT SHOWS
Total leads	The number of leads in the system.
New this month	Leads added since the first day of the current month.
Won deals	Leads with the status Won .
Conversion rate	Won leads as a percentage of all closed leads (Won + Lost). For example, 2 won and 1 lost gives 66.7%.
Open pipeline	The total estimated value of all leads that are not yet Won or Lost.

Charts and recent leads

- **Pipeline by status:** how many leads are at each stage. A long bar at **New** means many leads still need first contact.
- **Leads by source:** which channels bring in the most leads.
- **Recent leads:** the five most recently added leads, with their status and score.

4 Working with leads

Click **Leads** in the menu to see, search and manage all your leads.



Lead Generation System

Leads
Search, qualify and follow up on prospects

Administrator Admin Sign out

Search name, email, company...

All statuses All sources Newest + New lead

NAME	EMAIL	COMPANY	SOURCE	VALUE	SCORE	STATUS
OF Omar Faruk Developer	omar.faruk@outlook.com	Self-employed	Email Campaign	\$3,000	40	New
LS Laura Schmidt Office Manager	laura.schmidt@alpineski.de	Alpine Ski House	Website	\$7,500	70	New
KT Kenji Tanaka IT Manager	k.tanaka@proseware.jp	Proseware	Trade Show	\$26,000	80	Contacted
NJ Nusrat Jahan Founder	nusrat@litware.com.bd	Litware BD	Referral	\$47,000	90	Won
MJ Mark Johnson	mark.j@yahoo.com	—	Cold Call	—	0	Lost
PN Priya Nair Director of Sales	priya.nair@tailspin.in	Tailspin Toys	Website	\$35,000	90	Qualified
TA Tanvir Ahmed Procurement Lead	tanvir@wideworldimporters.com	Wide World Importers	Email Campaign	\$18,000	80	New
EC Emily Carter VP Operations	emily.carter@adatum.com	Adatum Corp	LinkedIn	\$1,20,000	100	Proposal Sent
RI Rafiq Islam Head of IT	rafiq.islam@fabrikam.com	Fabrikam Inc	Trade Show	\$56,000	100	Won
DL David Lee Consultant	david.lee@gmail.com	Freelance	LinkedIn	\$4,000	30	Contacted
AR Amina Rahman Marketing Manager	amina@contoso.io	Contoso Ltd	Website	\$22,000	80	Qualified

<> API docs

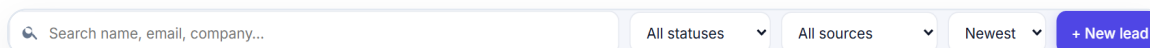
Figure 4.1 The lead list

Each row shows the lead's name and job title, email, company, source, estimated value, score and status. Newest leads are shown first, 15 per page. Use **< Prev** and **Next >** at the bottom to move between pages.

CAN'T SEE THE EDIT AND DELETE BUTTONS?

On narrower screens, the **Activities**, **Edit** and **Delete** buttons are at the far right of each row. Scroll the list sideways, or narrow the list with a search or filter.

Search, filter and sort



Search name, email, company...

All statuses All sources Newest + New lead

Figure 4.2 Search box, filters, sort order and the New lead button

- **Search box:** type part of a name, email address or company. The list updates as you type.
- **All statuses:** show only leads with one status, for example **Qualified**.
- **All sources:** show only leads from one source, for example **Website**.
- **Sort:** **Newest**, **Score** (highest first), **Value** (largest first) or **Name** (A–Z).

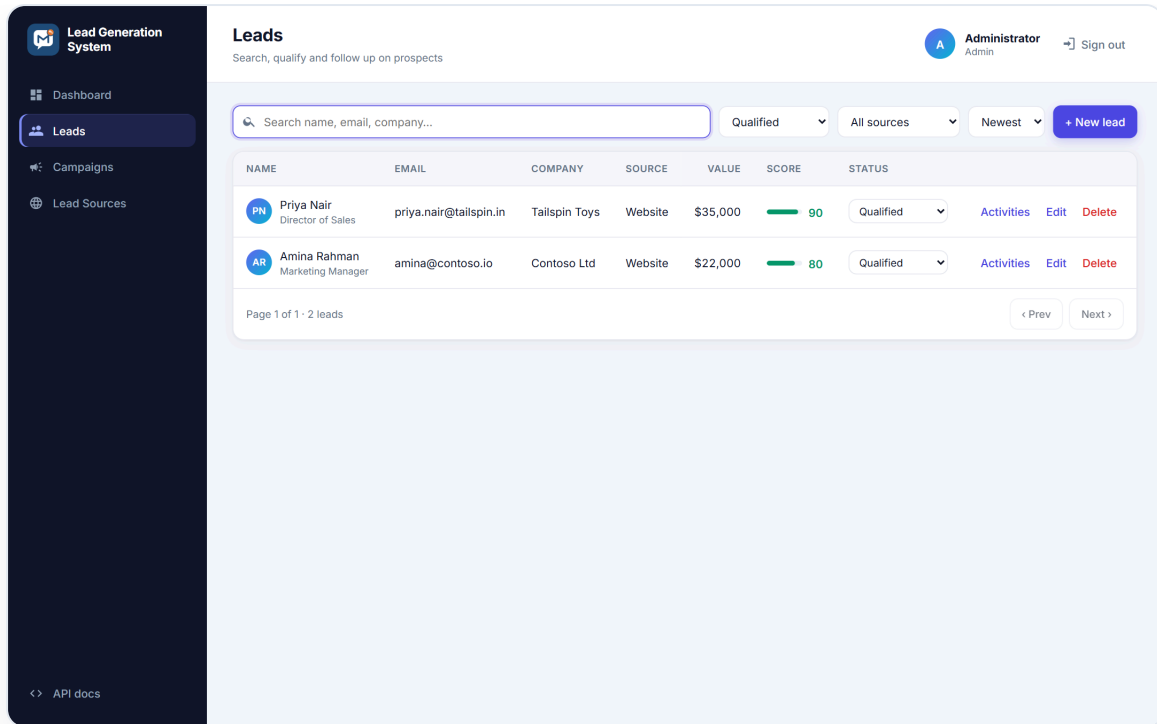


Figure 4.3 Leads filtered to status "Qualified", with the Activities, Edit and Delete buttons

TIP: FIND YOUR BEST LEADS

Set the sort to **Score** to put the most promising leads at the top. Combine it with the status filter **New** to see who to call first.

Add a new lead

- 1 Click **+ New lead** at the top right of the lead list.
- 2 Fill in the form. Fields marked * are required.
- 3 Click **Save lead**. The lead appears at the top of the list with its score already calculated.

New lead

First name*

Farhan

Last name*

Chowdhury

Email*

farhan@bluebay.com.bd

Phone

+880 1733 123456

Company

BlueBay Logistics

Job title

Operations Director

Country

Bangladesh

Assigned to

Administrator

Estimated value

30000

Source*

Referral

Campaign

Q4 Webinar Series

Notes

Met at partner event. Interested in fleet tracking.

Cancel

Save lead

Figure 4.4 The New lead form

FIELD	WHAT TO ENTER
First name*, Last name*	The person's name.
Email*	Must be a valid email address. Each email can only be used for one lead.
Phone	Include the country code, for example +880 1733 123456 .
Company, Job title	Where they work and their role. Senior titles (CEO, Director, Head...) raise the score.
Country	The lead's country.
Assigned to	The team member responsible for following up.
Estimated value	How much the deal could be worth. Numbers only, no currency symbol.
Source*	Where the lead came from. Only active sources are listed.
Campaign	The campaign that produced the lead, if any.
Notes	Anything useful, up to 2,000 characters.

NAME	EMAIL	COMPANY	SOURCE	VALUE	SCORE	STATUS
FC Farhan Chowdhury Operations Director	farhan@bluebay.com.bd	BlueBay Logistics	Referral	\$30,000	90	New
OF Omar Faruk Developer	omar.faruk@outlook.com	Self-employed	Email Campaign	\$3,000	40	New
LS Laura Schmidt Office Manager	laura.schmidt@alpineski.de	Alpine Ski House	Website	\$7,500	70	New
KT Kenji Tanaka IT Manager	k.tanaka@proseware.jp	Proseware	Trade Show	\$26,000	80	Contacted
NJ Nusrat Jahan Founder	nusrat@litware.com.bd	Litware BD	Referral	\$47,000	90	Won
MJ Mark Johnson	mark.j@yahoo.com	—	Cold Call	—	0	Lost
PN Priya Nair Director of Sales	priya.nair@tailspin.in	Tailspin Toys	Website	\$35,000	90	Qualified
TA Tanvir Ahmed Procurement Lead	tanvir@wideworldimporters.com	Wide World Importers	Email Campaign	\$18,000	80	New
EC Emily Carter VP Operations	emily.carter@adatum.com	Adatum Corp	LinkedIn	\$1,20,000	100	Proposal Sent
RI Rafiq Islam Head of IT	rafiq.islam@fabrikam.com	Fabrikam Inc	Trade Show	\$56,000	100	Won
DL David Lee Consultant	david.lee@gmail.com	Freelance	LinkedIn	\$4,000	30	Contacted

Figure 4.5 The new lead (Farhan Chowdhury) at the top of the list, with a confirmation message

If the form can't be saved, a red message explains why, for example when the email address already belongs to another lead:

New lead

First name*

Test

Last name*

Duplicate

Email*

sarah.khan@northwind.com

Phone

Company

Job title

Country

Assigned to

Estimated value

Source*

Cold Call

Campaign

— none —

Notes

A lead with email 'sarah.khan@northwind.com' already exists.

Cancel

Save lead

Figure 4.6 A lead with this email already exists

Change a lead's status

Leads normally move through these stages:



- 1 Find the lead in the list.
- 2 Choose the new status from the drop-down in the **Status** column (see Figure 4.3).
- 3 The change is saved immediately and a message confirms "*Status updated*".

Every status change is recorded automatically in the lead's activity history (chapter 5), so you can always see when a lead moved and from which stage.

Edit a lead

- 1 Click **Edit** on the lead's row.
- 2 Change any details and click **Save lead**. The score is recalculated.

The 'Edit lead' form contains the following fields and options:

- First name***: Text input with 'Sarah'.
- Last name***: Text input with 'Khan'.
- Email***: Text input with 'sarah.khan@northwind.com'.
- Phone**: Text input with '+44 20 7946 0101'.
- Company**: Text input with 'Northwind Traders'.
- Job title**: Text input with 'CEO'.
- Country**: Text input with 'United Kingdom'.
- Assigned to**: Text input with 'Administrator'.
- Estimated value**: Text input with '85000'.
- Source***: Dropdown menu with 'Referral' selected.
- Campaign**: Dropdown menu with '— none —' selected.
- Notes**: Large text area for additional information.
- Buttons**: 'Cancel' and 'Save lead' at the bottom right.

Figure 4.7 Editing an existing lead

Delete a lead

Click **Delete** on the lead's row and confirm. The lead and all of its activities are removed.

DELETING CAN'T BE UNDONE

To keep a record of a lead you're no longer pursuing, change its status to **Lost** instead of deleting it. Lost leads also count towards the conversion rate.

5 Activities

Activities are the history of everything that happened with a lead. Record each call, email and meeting so the whole team knows where things stand.

The screenshot shows a window titled "Activities - Sarah Khan". At the top, there is a dropdown menu set to "Call" and a text input field containing "Follow-up call". To the right of the input field is a button labeled "Confirm contract start date" and a blue "Add" button. Below this is a vertical timeline of activities, each preceded by a blue circle icon. The activities listed are: "Legal review in progress" (Note - 23/10/2026, 9:58:58 am), "Demo with leadership team" (Meeting - 23/10/2026, 9:58:58 am), "Discovery call" (Call - 23/10/2026, 9:58:58 am), "Sent product brochure" (Email - 23/10/2026, 9:58:58 am), "Status changed from ProposalSent to Negotiation" (Status Change - 23/10/2026, 9:58:57 am), and "Status changed from Qualified to ProposalSent" (Status Change - 23/10/2026, 9:58:57 am). At the bottom right of the window is a "Close" button.

Figure 5.1 Activity history for Sarah Khan, with a new call being added

View a lead's history

Click **Activities** on the lead's row. The newest activity is at the top. Each entry shows its type, date and time, and details.

Add an activity

- 1 In the Activities window, choose the type: **Note**, **Call**, **Email** or **Meeting**.
- 2 Type a short **Subject**, for example "Follow-up call".
- 3 Optionally add **Details**, for example what was agreed.
- 4 Click **Add**. The activity appears at the top of the history.
- 5 Click **Close** when you're done.

STATUS CHANGES ARE ADDED FOR YOU

Entries such as "Status changed from Qualified to ProposalSent" are created automatically whenever you change a lead's status.

6 Lead scoring

Every lead gets a score from 0 to 100, calculated automatically when it's added or edited. You can't type the score yourself. Complete the lead's details to improve it.

How points are given

AREA	RULE	POINTS
Complete profile	Phone 10 · Company 10 · Job title 5 · Country 5	up to 30
Business email	Email uses a company domain (not Gmail, Yahoo, Hotmail, Outlook, iCloud and similar free addresses)	20
Seniority	CEO, CTO, CFO, COO, Chief, Founder, Owner, President, Director, VP, Head: 25 Manager, Lead, Supervisor, Principal: 15 · any other job title: 5	up to 25
Estimated value	50,000 or more: 25 · 10,000 or more: 15 · any value above 0: 5	up to 25

Reading the score

The score has a coloured bar in the lead list:

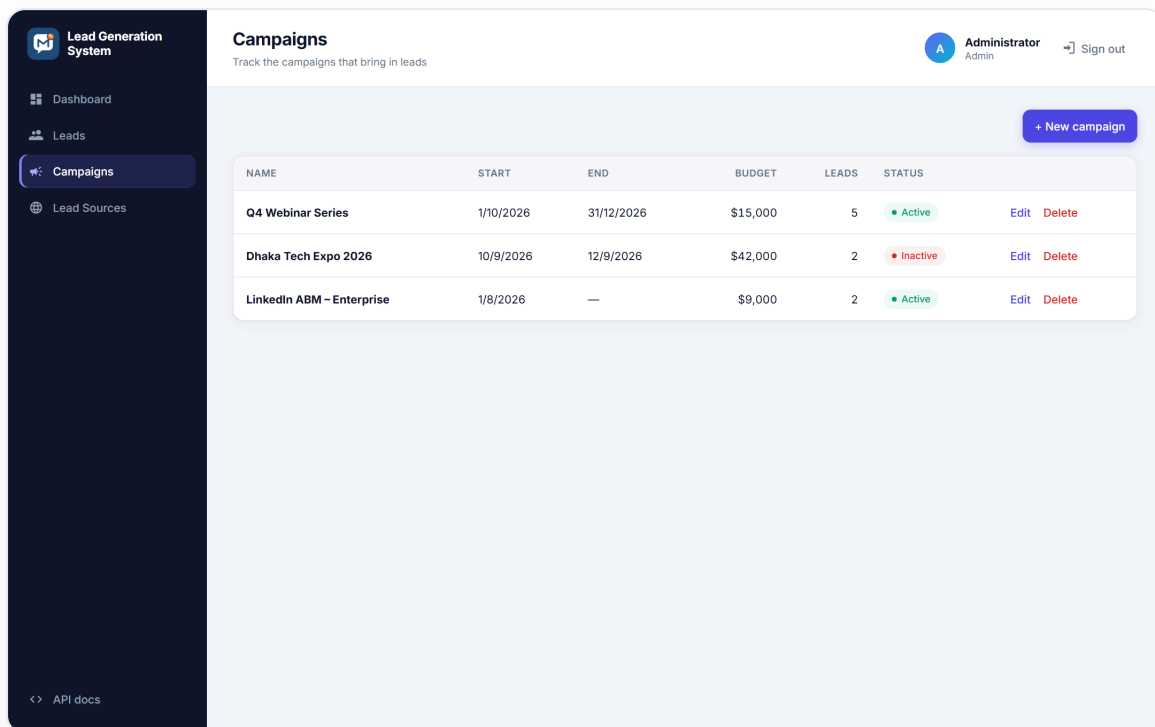
- 70–100 Hot** Strong lead. Follow up first.
- 40–69 Warm** Worth pursuing. Try to fill in missing details.
- 0–39 Cold** Little information or low value so far.

EXAMPLE

Sarah Khan (CEO at Northwind Traders, company email, phone and country filled in, estimated value 85,000) scores $30 + 20 + 25 + 25 = \mathbf{100}$. Mark Johnson (Yahoo email, no other details) scores **0**.

7 Campaigns

Campaigns are your marketing activities. Link leads to a campaign to see which ones bring in the most leads.



NAME	START	END	BUDGET	LEADS	STATUS	
Q4 Webinar Series	1/10/2026	31/12/2026	\$15,000	5	Active	Edit Delete
Dhaka Tech Expo 2026	10/9/2026	12/9/2026	\$42,000	2	Inactive	Edit Delete
LinkedIn ABM - Enterprise	1/8/2026	—	\$9,000	2	Active	Edit Delete

Figure 7.1 The campaign list, with the number of leads from each campaign

Add a campaign

- 1 Click **Campaigns** in the menu, then **+ New campaign**.
- 2 Enter a **Name** and **Start date** (both required). Add an **End date**, **Budget** and **Description** if you know them.
- 3 Leave **Active** ticked while the campaign is running.
- 4 Click **Save campaign**.

The screenshot shows a 'Campaign' form with the following fields and values:

- Name***: Spring Email Promotion 2027
- Start date***: 01-03-2027
- End date**: 30-04-2027
- Budget**: 5000
- Active**: ☒ Active
- Description**: Discount campaign to existing newsletter subscribers.

At the bottom right, there are two buttons: 'Cancel' and 'Save campaign'.

Figure 7.2 Creating a campaign

The end date can't be earlier than the start date.

Edit or delete a campaign

Use **Edit** or **Delete** on the campaign's row. When you delete a campaign, its leads are **kept**; they're simply no longer linked to any campaign. To stop using a finished campaign without losing the link, edit it and untick **Active**.

8 Lead sources

Lead sources are the channels leads come from. Six are set up for you: Website, Referral, LinkedIn, Email Campaign, Trade Show and Cold Call.

NAME	DESCRIPTION	LEADS	STATUS
Cold Call	Outbound phone prospecting	1	Active Edit Delete
Email Campaign	Outbound or newsletter email	2	Active Edit Delete
LinkedIn	LinkedIn outreach and ads	2	Active Edit Delete
Referral	Referred by a customer or partner	3	Active Edit Delete
Trade Show	Events and exhibitions	2	Active Edit Delete
Website	Website contact / landing page forms	3	Active Edit Delete

Figure 8.1 The lead source list

Add a source

- 1 Click **Lead Sources** in the menu, then **+ New source**.
- 2 Enter a **Name** (it must be unique) and an optional **Description**.
- 3 Click **Save source**.

Lead source

Name*

Facebook Ads

Description

Paid social campaigns on Facebook and Instagram

☒ Active

Cancel Save source

Figure 8.2 Adding a new lead source

Deactivate instead of delete

A source that's used by any lead **can't be deleted**, so you don't lose information about where existing leads came from. To stop using it, click **Edit**, untick **Active** and save. Inactive sources no longer appear when you add a new lead, but existing leads keep them.

9 Installation

For administrators. You install the system once on a server or PC; everyone else uses it from their browser.

Before you start

- A 64-bit Windows 10, Windows 11 or Windows Server computer, and an administrator account on it.
- Microsoft SQL Server (any edition, including the free Express edition) installed and running.
- A SQL Server login that can create databases, for example `sa`. You don't need to install .NET.
- The installer file: `LeadGenerationSystem-Setup-1.0.0.exe`.

Run the installer

- 1 Double-click `LeadGenerationSystem-Setup-1.0.0.exe` and click **Yes** when Windows asks for permission.
- 2 **Welcome:** click **Next**.
- 3 **Install folder:** keep the default (`C:\Program Files\Lead Generation System`) or choose another.
- 4 **Database:** enter the SQL Server instance (for example `MYPC` or `MYPC\SQLEXPRESS`), the database name (default `LGSDb`) and the SQL user name and password. Leave the user name empty to use Windows authentication. The installer tests the connection before continuing.
- 5 **Administrator account:** choose the username and password (at least 8 characters) you'll use to sign in for the first time.
- 6 **Web server:** keep port `5019` unless another program uses it. Tick **Allow access from other computers** if colleagues will use the system from their own PCs.
- 7 Check the summary and click **Install**. The installer creates the database, starts the system and adds shortcuts.
- 8 Click **Finish**. The system opens in your browser. Sign in with the administrator account from step 5.

After installation

- If you allowed access from other computers, colleagues open `http://<server name>:5019` in their browser, for example `http://SALES-PC:5019`.
- The system runs as a Windows service called **Lead Generation System**. It starts automatically with Windows and restarts itself if it stops unexpectedly.
- Settings are stored in `appsettings.Production.json` in the install folder. Only administrators can open it.
- The `Database` folder contains `LGSDb.sql` if your database administrator prefers to create the database manually.

Upgrade or uninstall

- **Upgrade:** run the new installer. Your previous answers are filled in (re-enter passwords). Your data is kept and the database is upgraded automatically.
- **Uninstall:** go to **Settings** → **Apps** → **Installed apps**, find **Lead Generation System** and click **Uninstall**. The program is removed but the **database is kept**, so no data is lost.

10

Troubleshooting

Common messages and what to do about them.

MESSAGE OR PROBLEM	WHAT TO DO
Invalid username or password.	Check Caps Lock and try again. Click Show to see the password you typed. Ask your administrator if you've forgotten it.
Too many attempts. Please wait a minute and try again.	Wait one minute before trying to sign in again.
You're taken back to the sign-in page	Your session ended (8 hours without activity, or you signed out in another tab). Sign in again.
A lead with email '...' already exists.	That person is already in the system. Search for the email address and update the existing lead instead.
Lead source '...' is inactive.	Choose a different source, or ask an administrator to reactivate it on the Lead Sources page.
Lead source '...' is used by existing leads. Deactivate it instead of deleting.	Edit the source and untick Active (chapter 8).
Campaign end date cannot be before its start date.	Correct the dates and save again.
The page doesn't open at all	Check the address and port. Administrators: open Services in Windows and make sure Lead Generation System is running; if it won't start, check that SQL Server is running and that the connection details in <code>appsettings.Production.json</code> are correct, then restart the service.
Can't see Edit or Delete on the lead list	Scroll the list sideways, or use a search or filter to narrow it (chapter 4).