# Service Leads

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## Purpose and when to use this record

Capture a prospective service job and advance it from initial contact through qualification, quoting, scheduling, and conversion.

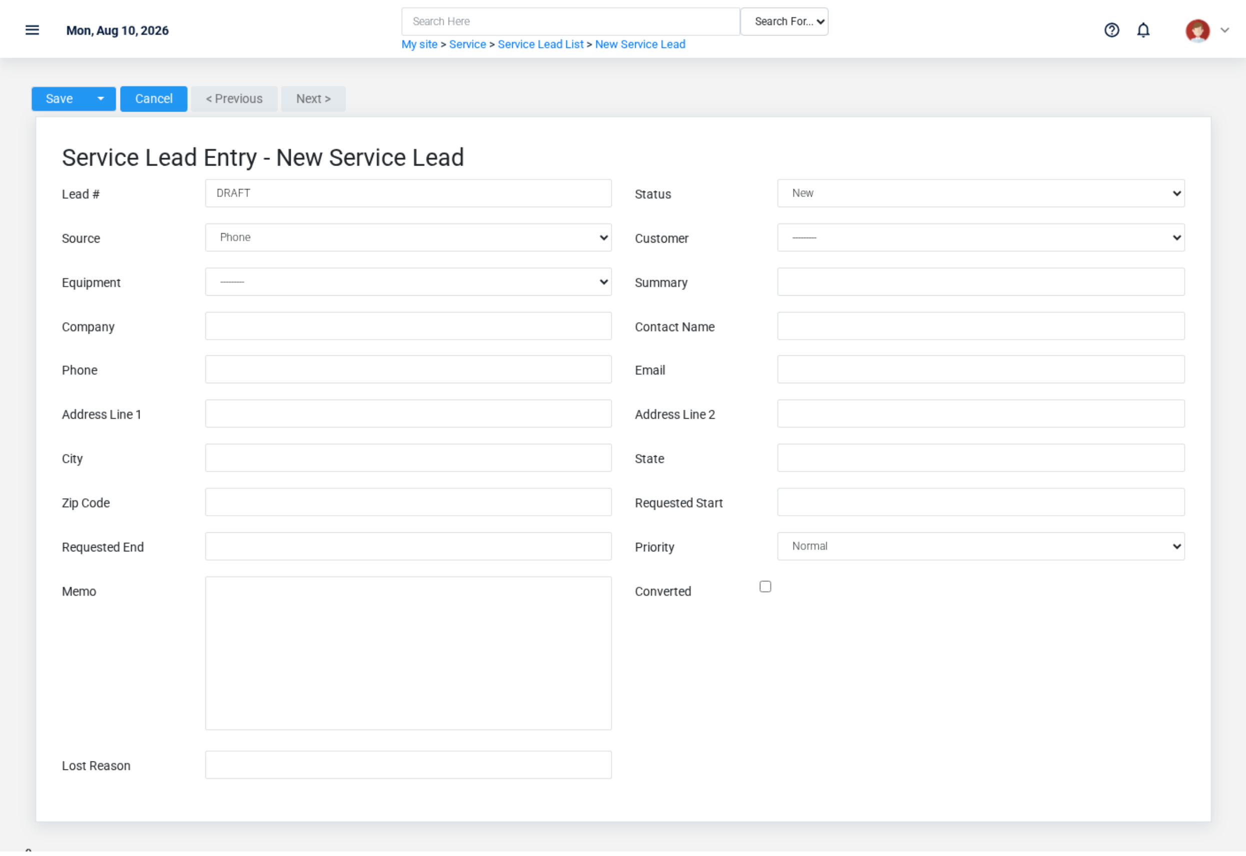
## At a glance

- **Identify it by: Lead #**, **Status**, and **Contact Name**.
- **Check its business context: Customer**, **Equipment**, and **Quote**.
- **Why care:** Customer, equipment, scope, priority, technician availability, parts, labor, and status must stay aligned from intake through billing.
- **Why care:** Status communicates workflow progress to other staff. Change it only when the underlying work, approval, payment, or handoff has actually occurred.

## Before you begin

You need the Brisk permission for the action you are taking on service leads. If a Create, Edit, or Delete control is absent, do not work around it with another user’s account; ask an administrator to review your role.

## Create a Service Lead



The Service Leads create screen in the Brisk documentation demo.

Create a Service Lead after searching for the person, organization, item, location, or resource under alternate names and identifiers. Merge or correct an existing master record instead of creating a duplicate.

1. Select the business context first: **Customer**, **Equipment**, and **Quote**.
2. Enter the required identifying and operational values: **Lead #**.
3. Review **Status**, **Source**, **Priority**, and **Converted** deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the Service Lead, then confirm **Lead #**, **Status**, and **Contact Name** on its detail page before continuing.

After saving: Qualify the request, prepare a service quote when pricing is needed, and convert won work without duplicating the customer or equipment.

# Delete a Service Lead

Delete this Service Lead only if it is an unused duplicate or setup mistake. Once other records refer to it, preserve that history and make the value inactive when the screen provides that option.

Before confirming, check for related **Bookings**, **Service Orders**, and **Service Quotes**. Brisk may refuse deletion when another record depends on this one; resolve the duplicate or use the supported correction workflow instead of breaking the trail.

On the confirmation page, verify **Lead #**, **Status**, and **Contact Name**. After confirmation, return to the Service Leads list and make sure only the intended Service Lead was removed.

# Review Service Lead details

Use the detail page as the shared record of what this Service Lead currently means. Verify **Status**, **Source**, and **Priority** before relying on it for a decision.

Follow **Customer**, **Equipment**, and **Quote** to determine whether the issue is on this Service Lead or on one of those linked records.

Next check: Qualify the request, prepare a service quote when pricing is needed, and convert won work without duplicating the customer or equipment.

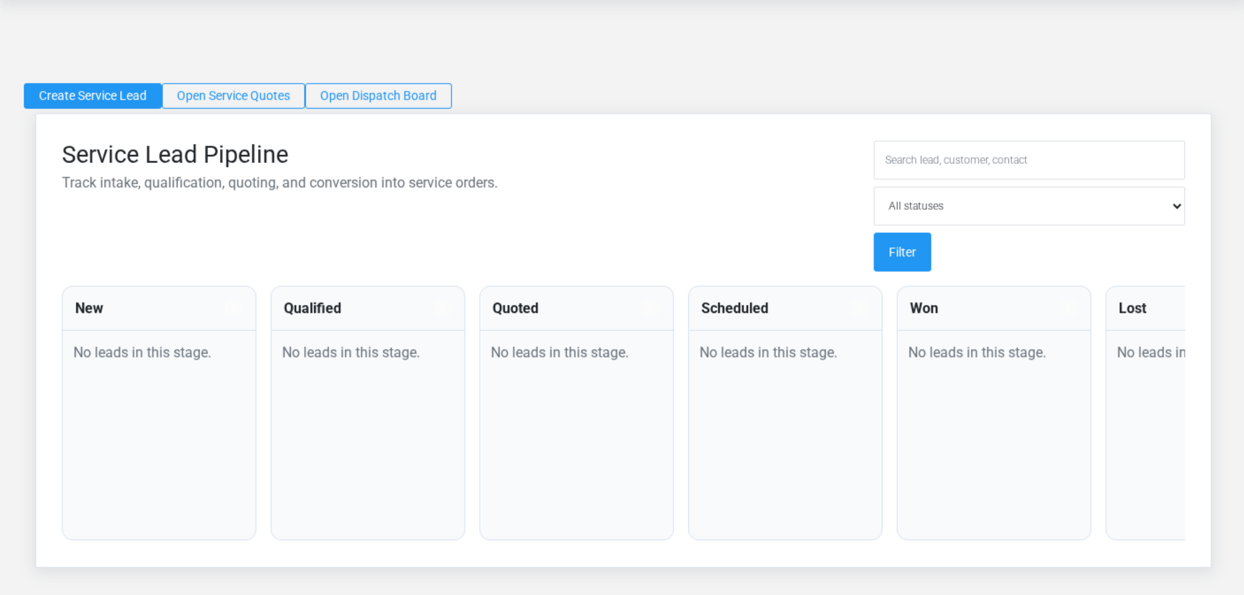
# Edit an existing Service Lead

Edit this Service Lead to keep the same real-world party, item, location, or resource accurate. Do not repurpose it for a different entity after activity is attached.

1. Open the detail page. Compare **Customer**, **Equipment**, and **Quote** with the supporting document or approved request.
2. Recheck **Status**, **Source**, **Customer**, and **Priority**. These values are most likely to change intake, estimating, dispatch, parts, labor, completion, and billing.
3. Save the change, return to the list, and confirm that the Service Lead now appears under the expected **Status**, **Source**, and **Priority**.

After the change: Qualify the request, prepare a service quote when pricing is needed, and convert won work without duplicating the customer or equipment.

# Find and review service leads



The Service Leads list screen in the Brisk documentation demo.

Use the Service Leads list to find the correct record before opening or changing it. Compare **Lead #**, **Status**, and **Contact Name**. Records with similar names or numbers can still belong to different **Customer**, **Equipment**, and **Quote**.

Open the Service Lead whose **Lead #**, **Status**, and **Contact Name** match the task. If it is missing, clear the list filters and recheck **Status**, **Source**, and **Priority** rather than creating a replacement immediately.

# Fields and business rules

Brisk stores 22 user-relevant fields for this Service Lead, including 3 linked-record selections and 3 controlled-choice fields. Create and edit screens may hide calculated or workflow-managed values from this full reference.

| Field | Required | What it controls |
|---|---:|---|
| **Lead #** | Yes | Friendly number shown in the service lead pipeline and search results. |
| **Status** | No | Current status of this service lead. Available values: New, Qualified, Quoted, Scheduled, Won, Lost. |
| **Source** | No | The source recorded for this service lead. Available values: Phone, Email, Web, Referral, Repeat Customer, Walk-In, Other. |
| **Customer** | No | Optional existing customer linked to this lead. |

| Field | Required | What it controls |
|---|---:|---|
| **Equipment** | No | Optional equipment connected to this lead. |
| **Quote** | No | Legacy sales quote linked to this opportunity. |
| **Summary** | No | Short description of the requested work. |
| **Company** | No | Prospect company name when no customer record exists yet. |
| **Contact Name** | No | The contact name recorded for this service lead. |
| **Phone** | No | The phone recorded for this service lead. |
| **Email** | No | The email recorded for this service lead. |
| **Address Line 1** | No | The address line 1 recorded for this service lead. |
| **Address Line 2** | No | The address line 2 recorded for this service lead. |
| **City** | No | The city recorded for this service lead. |
| **State** | No | The state recorded for this service lead. |
| **Zip Code** | No | The zip code recorded for this service lead. |
| **Requested Start** | No | Date and time recorded for requested start on this service lead. |
| **Requested End** | No | Date and time recorded for requested end on this service lead. |
| **Priority** | No | The priority recorded for this service lead. Available values: Low, Normal, High, Urgent. |
| **Memo** | No | The memo recorded for this service lead. |
| **Converted** | No | Whether the converted option applies to this service lead. |
| **Lost Reason** | No | The lost reason recorded for this service lead. |

# What happens next

Qualify the request, prepare a service quote when pricing is needed, and convert won work without duplicating the customer or equipment.

# Common mistakes and troubleshooting

- **The record will not save:** Recheck **Lead #** and any message beside the field. A required related record may also be inactive or unavailable to your role.
- **The record saved but is not available where expected:** Recheck **Status**, **Source**, and **Priority**, then clear the filters on the destination list. A saved record can still be inactive, unpublished, locked, unapproved, or in the wrong workflow state.
- **The values look right but the result is wrong:** Open **Customer**, **Equipment**, and **Quote** from the detail page. Correct the specific relationship that is wrong instead of forcing a total or status to compensate for it.

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