



BIDBUILD TRAINING · QUICK START

How to Add a New Lead

A step-by-step companion to the video walkthrough. Two ways to create a lead in BidBuild — the full client-first workflow, and the Quick Access shortcut.

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OVERVIEW

Every lead starts with a client

In BidBuild, a lead is an opportunity attached to a client record. Create the client once, then raise as many leads against them as the relationship produces — each with its own territory, opportunity type, sales agent, and pipeline stage.

CONTACTS · CLIENTS · LEADS

TWO WAYS TO DO IT

METHOD	WHERE	USE IT WHEN
Full workflow	Contacts → Clients	New client. You want to capture the full contact record — address, tags, custom fields like a gate code — before raising the opportunity.
Quick Access	Sidebar “+” → New Lead	You are moving fast, or the client already exists. Same lead fields, one click from anywhere in the app.

BEFORE YOU START

- Know the **lead source** (how they found you) and the **opportunity type** — both are required and both drive reporting.
- Know which **Kanban board** the lead belongs on and who the **primary sales agent** is.
- A client needs a **first name, last name, and email** at minimum.

WHY IT MATTERS

Source, territory, and opportunity type are the fields your pipeline reporting is built on. Fill them in at creation and the rest of the funnel — proposals, forecast, and win rate by source — stays accurate without cleanup later.

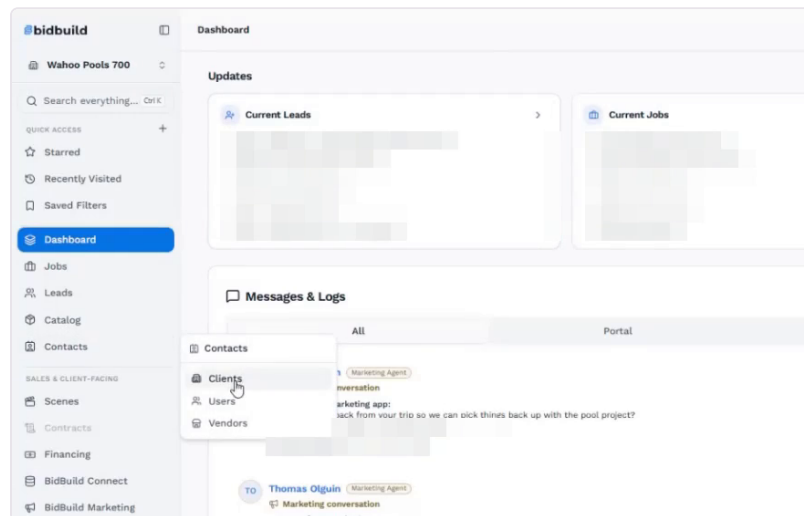
PART ONE

The full workflow

Create the client record first, then raise the lead against it.

STEP 01 Open Contacts, then Clients

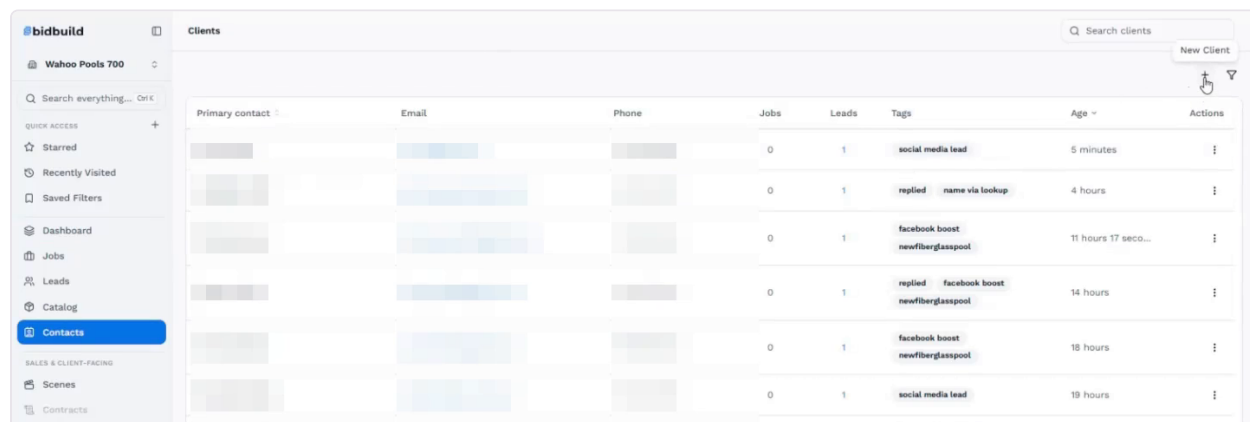
From the left sidebar, select **Contacts** and choose **Clients** from the menu.



SIDEBAR · CONTACTS → CLIENTS

STEP 02 Start a new client

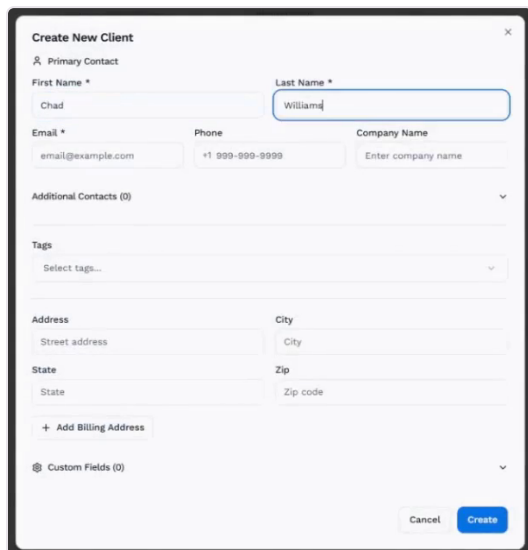
Select the **plus icon** in the upper right corner of the Clients screen.



CLIENTS · NEW CLIENT

STEP 03 Enter the primary contact

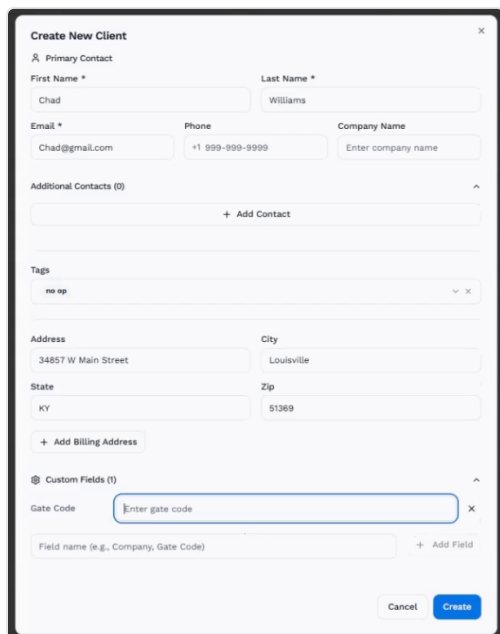
Start with the **first and last name** and the **email address**. Add the **phone number** and a **company name** if there is one.



CREATE NEW CLIENT · PRIMARY CONTACT

STEP 04 Add tags, address, and custom fields

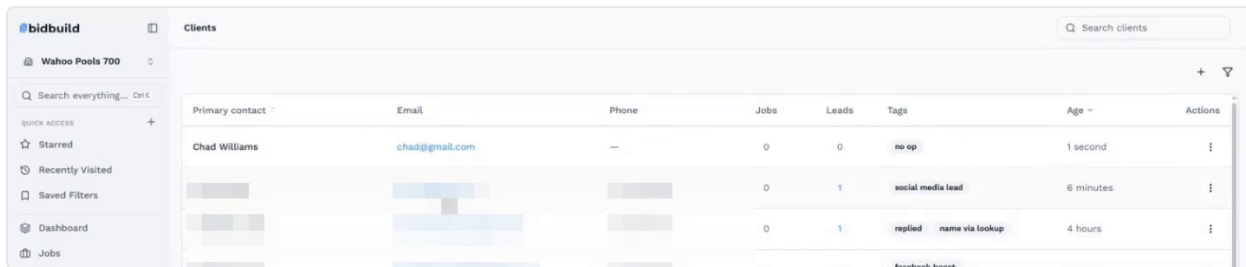
Apply any relevant **tags**, then enter the street address, city, state, and ZIP. Add a **billing address** if it differs, and use **Custom Fields** for anything specific to the property — a gate code, for example.



CREATE NEW CLIENT · COMPLETE RECORD

STEP 05 Select Create

The client is saved and appears at the top of the Clients list, ready for a lead.

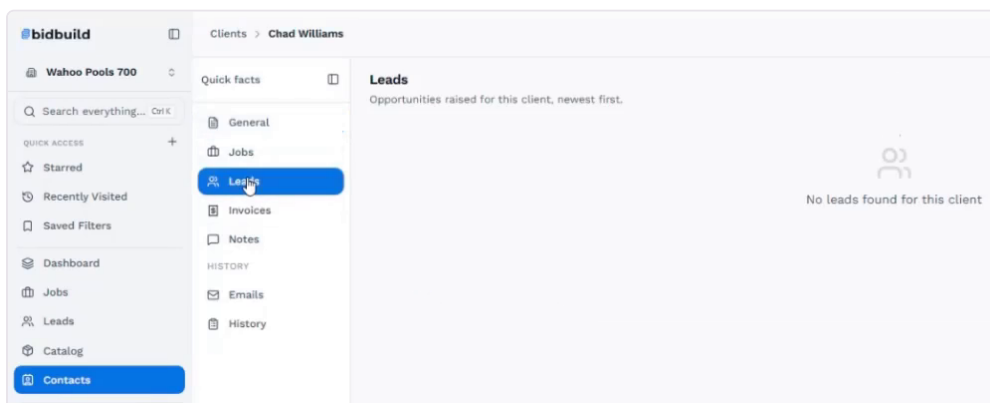


Primary contact	Email	Phone	Jobs	Leads	Tags	Age	Actions
Chad Williams	chad@gmail.com	—	0	0	no op	1 second	
			0	1	social media lead	6 minutes	
			0	1	replied name via lookup	4 hours	

CLIENTS · CLIENT SUCCESSFULLY CREATED

STEP 06 Open the client, then the Leads tab

Open the client record and select **Leads**. In the upper right corner, choose **New Lead**.



CLIENT RECORD · LEADS

TIP

Tags on the client record are what you filter and segment by later — lead source campaigns, referral partners, service history. Apply them at creation while the context is fresh.

STEP 07 Fill in the lead details

Name the **lead opportunity** — the client is already selected for you. Choose the **territory**, **opportunity type**, and **source**, leave **status** on Active, then pick the **Kanban board** and the **stage** the lead enters on.

The screenshot shows the 'Create new lead' form with the following fields filled or selected:

- Lead Opportunity Title:** Williams New Pool
- Client:** Williams, Chad
- Territory:** 700-TAMPA
- Opportunity types:** New Concrete Pool
- Source:** Google
- Status:** Active
- Kanban Board:** Pre - Sale
- Kanban Stage:** A dropdown menu is open showing options: New Lead, Client Outreach, Site Visit, Design & Proposal, Negotiation, Follow-Up, and Long Term Nurture (to nurture).
- Division:** Concrete Construction
- Primary Sales Agent:** Select user...
- Forecasted Revenue:** (empty field)
- Custom Field:** Add field
- Lead Tags:** Select tags...
- Notes:** (empty text area)

CREATE NEW LEAD · KANBAN STAGE

STEP 08 Assign the agent and forecast

Set the **primary sales agent**, and a secondary agent if the deal is shared. **Forecasted revenue** is optional — leave it blank and BidBuild fills it from the proposals you create. Add lead tags and notes as needed.

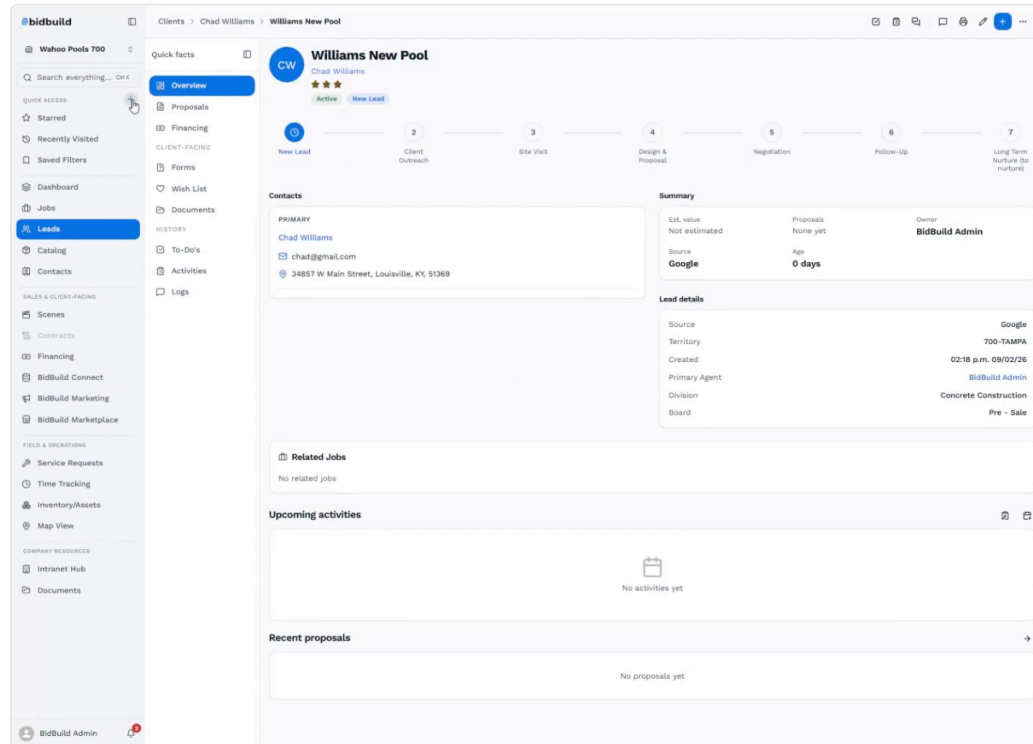
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- Source:** Google
- Status:** Active
- Kanban Board:** Pre - Sale
- Kanban Stage:** New Lead
- Division:** Concrete Construction
- Primary Sales Agent:** BidBuild Admin
- Secondary Sales Agents:** Select users...
- Forecasted Revenue:** (empty field)
- Custom Field:** Add field
- Lead Tags:** Select tags...
- Notes:** (empty text area)

CREATE NEW LEAD · COMPLETE

STEP 09 Save

The lead is live. It opens on the pipeline tracker at the stage you chose, with the contact, source, territory, and owner on the record — and proposals, financing, to-dos, and activities ready on the tabs beside it.



LEAD RECORD · OVERVIEW

WHAT HAPPENS NEXT

Work the lead through the stages along the top of the record. Proposals raised here carry the forecast, and when the lead converts, the job inherits the client, territory, and division you set at creation.

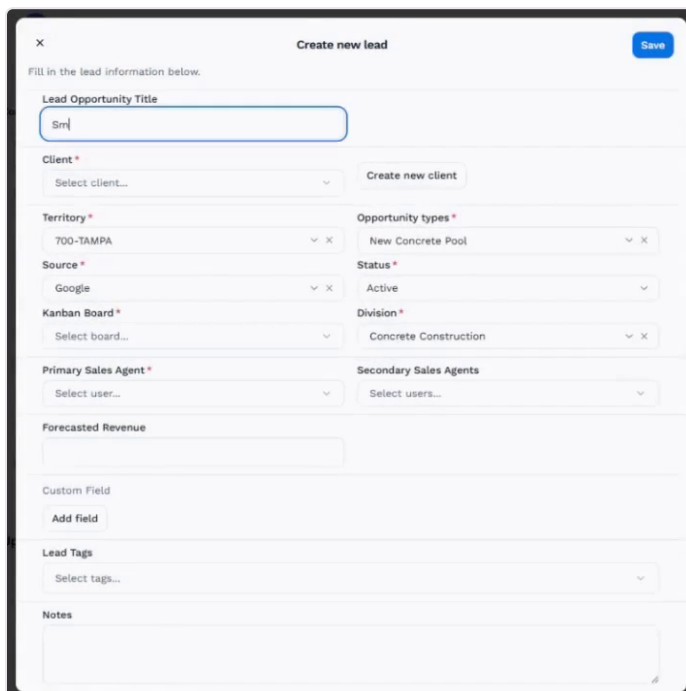
PART TWO

The quick way

Same lead, one click, from anywhere in the app.

STEP 01 Quick Access, then New Lead

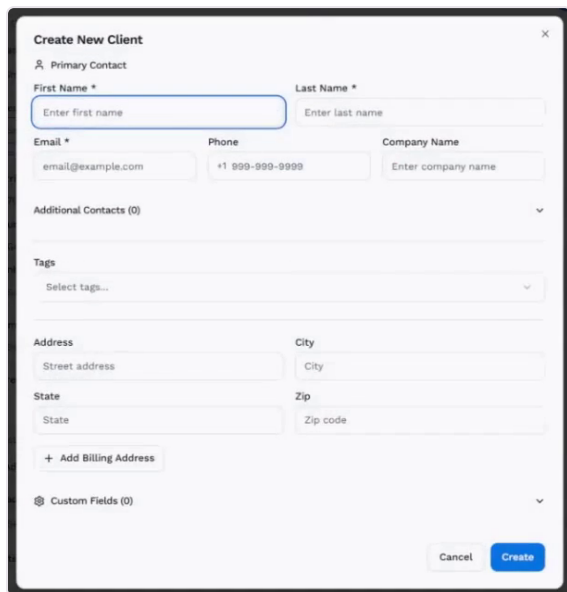
Select the **plus icon** next to Quick Access in the sidebar and choose **New Lead**. Enter the lead details right here — the fields are identical to the full workflow.



QUICK ACCESS · CREATE NEW LEAD

STEP 02 Attach the client

If the client already exists, search for them in the **Client** field and select them. If not, choose **Create new client** and enter their information without leaving the lead form.



CREATE NEW LEAD · CREATE NEW CLIENT

Complete the remaining fields and select **Save**. Your new lead is created.

WHICH ONE SHOULD YOU USE?

Use Quick Access when you are on the phone and need the lead captured before the call ends. Use the full workflow when the client record itself matters — service address, gate code, billing details — because that information follows the client into every job that comes after.

REFERENCE

Field reference and troubleshooting

LEAD FIELDS

FIELD	REQUIRED	NOTES
Lead Opportunity Title	Yes	How the lead reads on the board — client surname plus the work, e.g. “Williams New Pool”.
Client	Yes	Prefilled when you start from the client record; searchable from Quick Access.
Territory	Yes	Drives routing and territory reporting.
Opportunity Type	Yes	What the client is buying.
Source	Yes	How the lead found you — the basis of cost-per-lead reporting.
Status	Yes	Leave on Active for a live lead.
Kanban Board / Stage	Yes	Which pipeline the lead sits on, and where it enters.
Division	Yes	The part of the business that will deliver the work.
Primary Sales Agent	Yes	Owner of the lead. Add secondary agents for shared deals.
Forecasted Revenue	No	Leave blank to let proposals fill it automatically.
Lead Tags / Notes / Custom Field	No	For filtering and context.

IF SOMETHING WON'T SAVE

- **“Client is required.”** The lead has no client attached — select an existing client or create one from the lead form.
- **Client won't create.** First name, last name, and email are all required.
- **Can't find the stage list.** Pick the Kanban board first; the stages belong to the board.

ONE SYSTEM

Once the lead is saved, everything downstream hangs off this record — proposals, financing, to-dos, activities, and the job it becomes. Create it properly once and the rest of the workflow follows it.