Leads

Using Mria CRM · https://mriacrm.com/docs/leads/

iHow to Manage Leads in Mria CRM for Jira

The **Leads** module in Mria CRM helps you capture, organize, and manage potential customers. Leads can be viewed in a **table view** (all Leads) and a **detailed view** (single Lead). You can also create new Leads directly from this section.

See Activities for details on Notes, Meetings, Tasks, Files, and Jira links.

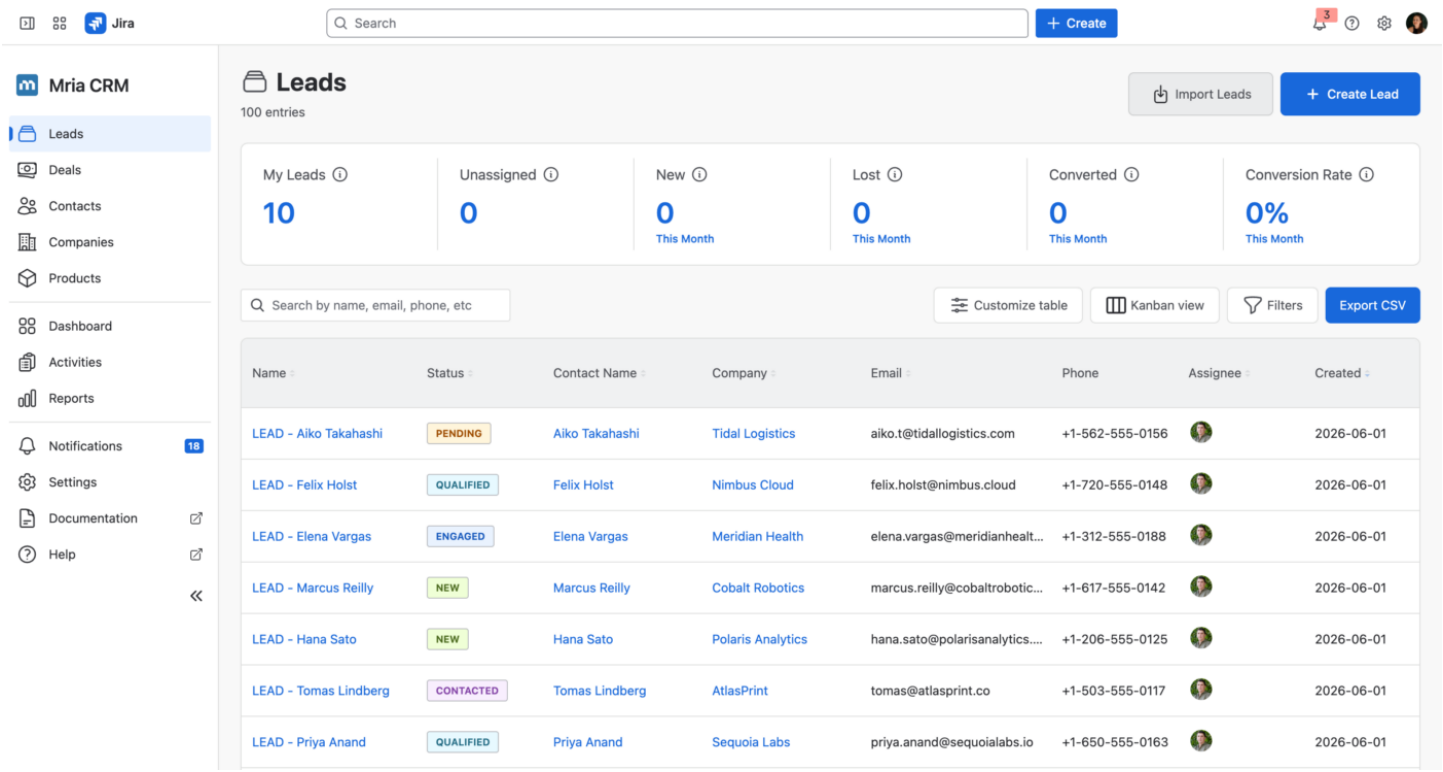
1. Views

Leads can be displayed in two formats depending on your workflow:

Table view

Displays Leads in a structured table format with columns such as Name, Company, Email, Status, Assignee, and Created date.

- Suitable for quick scanning, filtering, and sorting
- Supports column-based organization and detailed data visibility

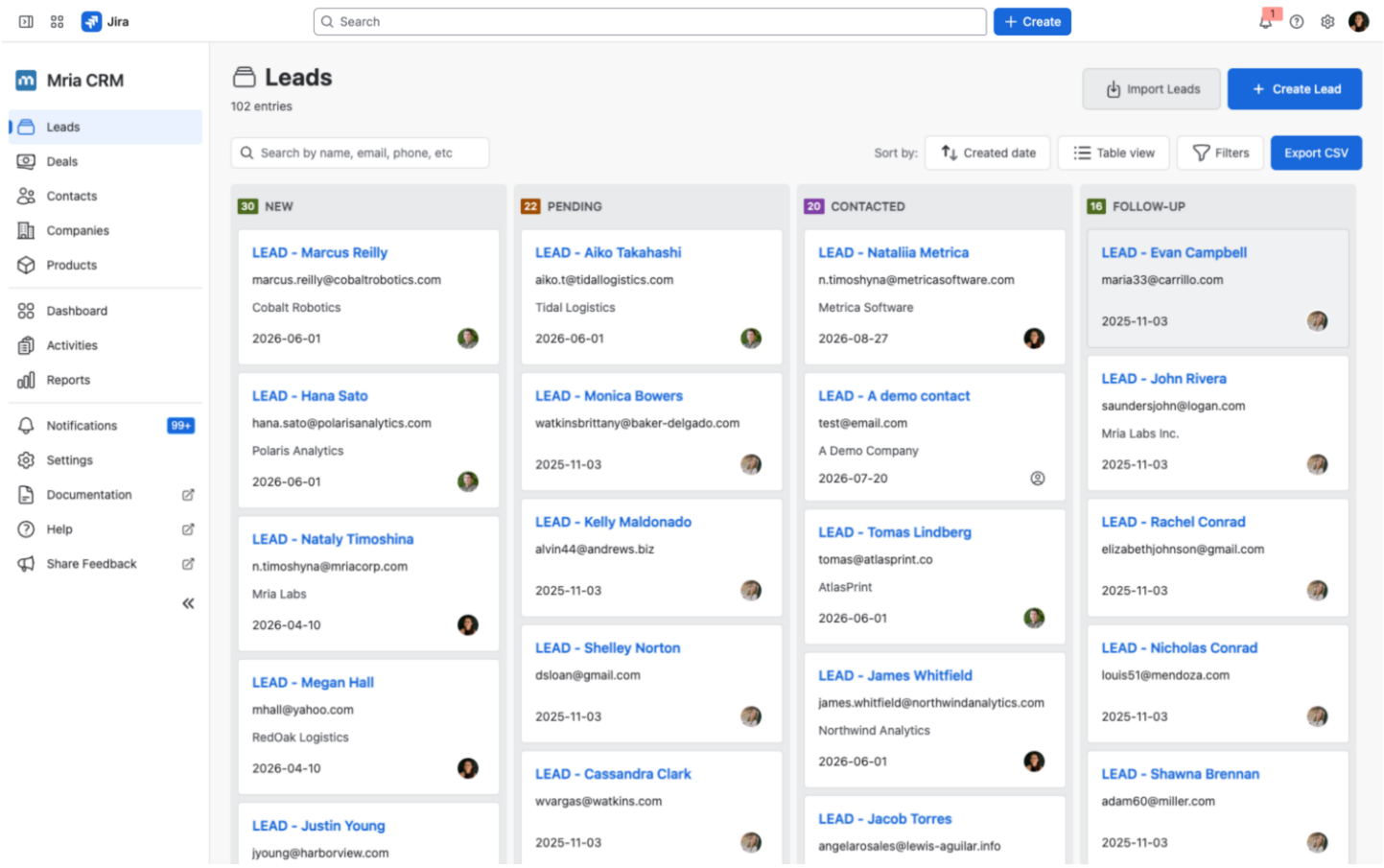


Export CSV: allows you to export the current list of Leads (based on applied filters and visible columns) as a `.CSV` file for external use.

Kanban view

Displays Leads in columns based on their current status.

- Columns represent Lead statuses (e.g. New, Contacted, Follow-up, Lost, Junk, ...)
- Each card shows key information such as Lead Name, Company, Email, Created date, and Assignee
- Cards can be moved between columns to update Lead status



Sorting

Leads can be sorted using the sorting control:

- **Created date**
- **Name**

Clicking the arrows toggles ascending/descending order.

2. Next activity and last activity

Every **Lead** carries two dates derived from the Tasks and Meetings booked against it:

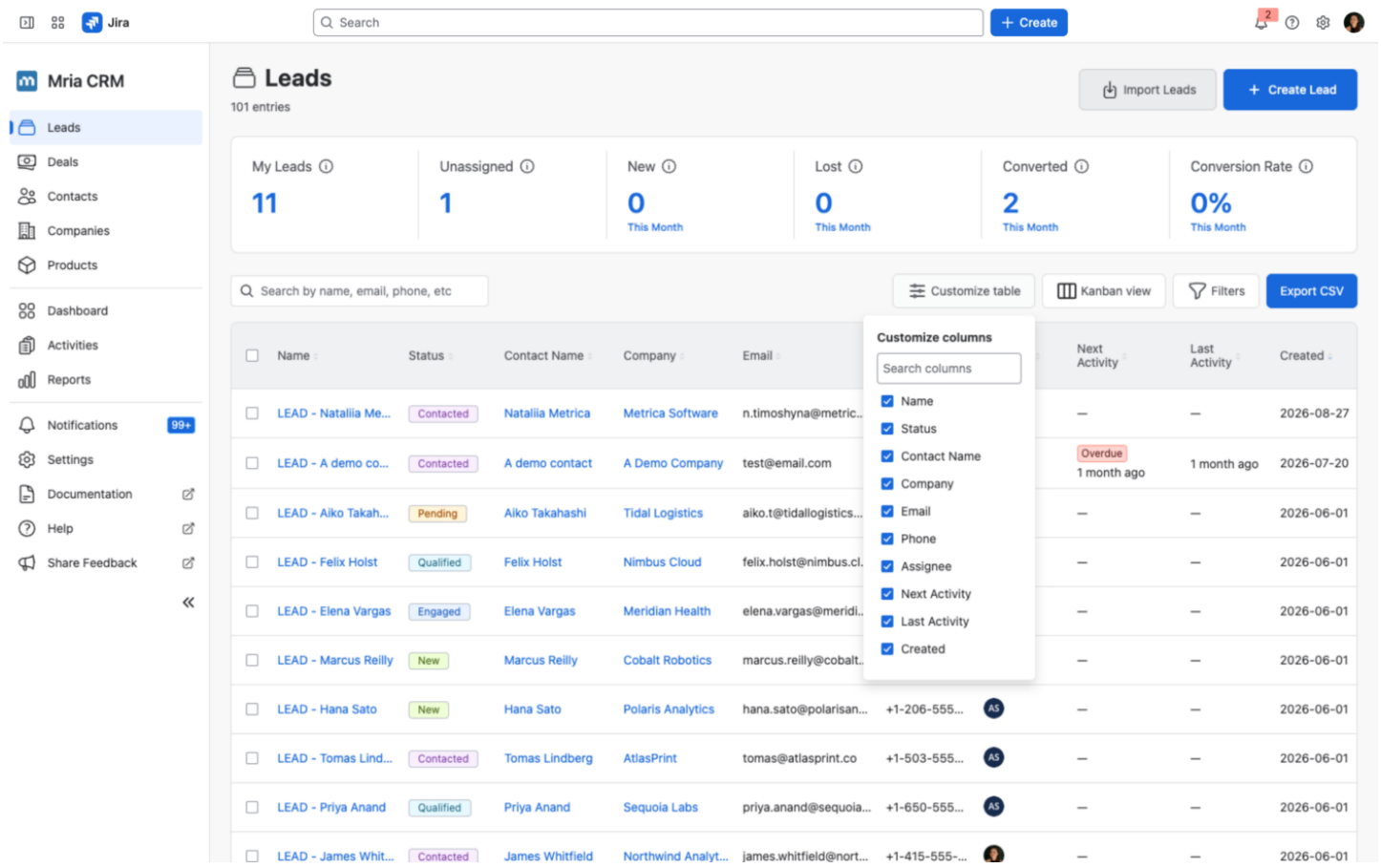
Field	Means
Next activity	The earliest **upcoming open** Task or Meeting on the record.
Last activity	The most recent **completed** one.

> **“Activity” here means Tasks and Meetings only**. Notes, emails and edits to the record do not move these dates. That is deliberate: these two fields answer “when did someone last actually do something with this lead, and what is next”, not “when was the record last touched”.

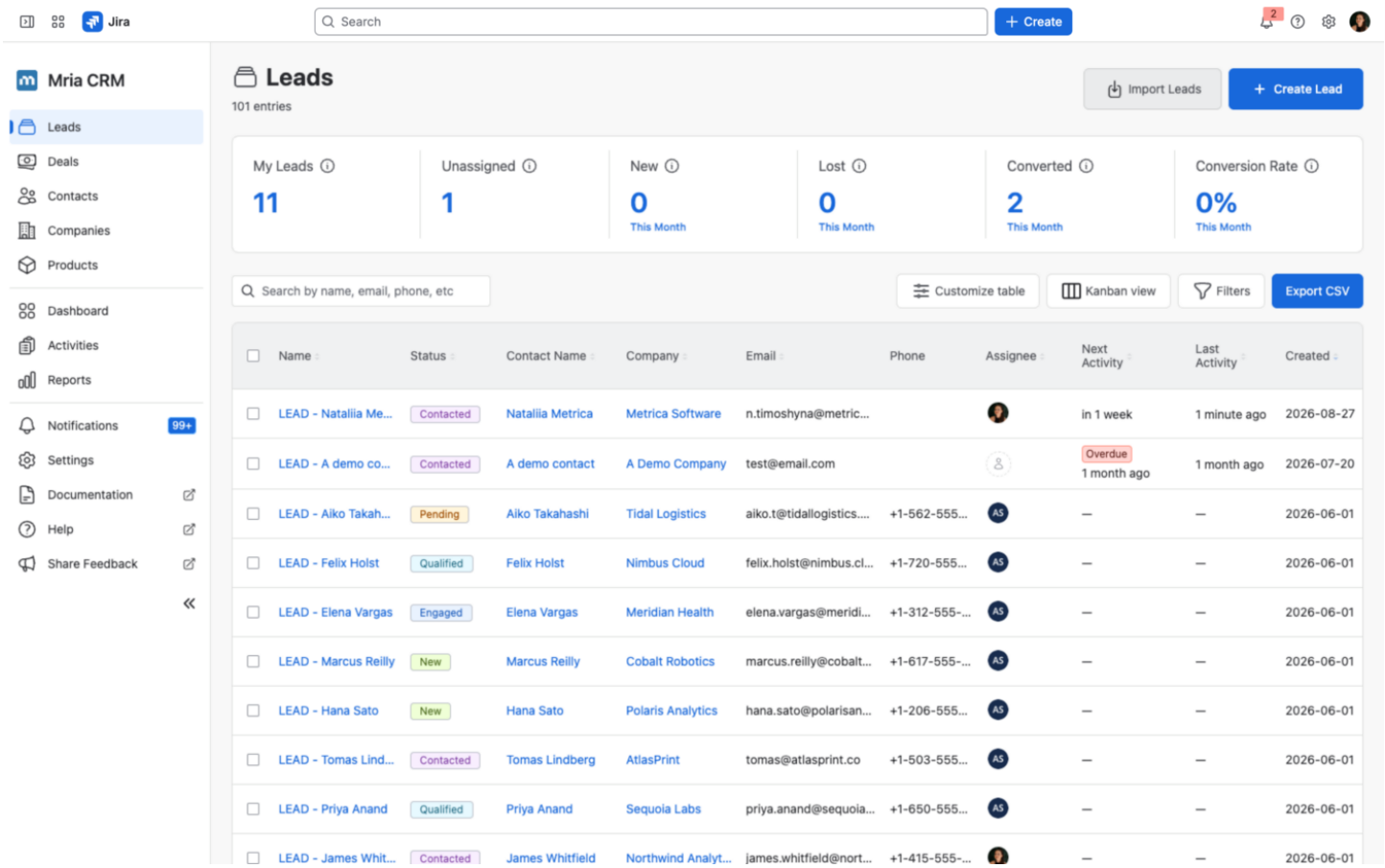
Neither is typed in — both follow the Tasks and Meetings themselves, so they stay correct as work is completed or rescheduled. Activities Breakdown explains the underlying split: Next activity reads from **Planned** (still open), Last activity from **Timeline** (already done).

Showing them in the table

Both columns are off by default. Open **Customize table** in the toolbar and tick **Next Activity** and **Last Activity**.



Once on, they sort like any other column, and a **Next activity** that has already passed is flagged **Overdue**.

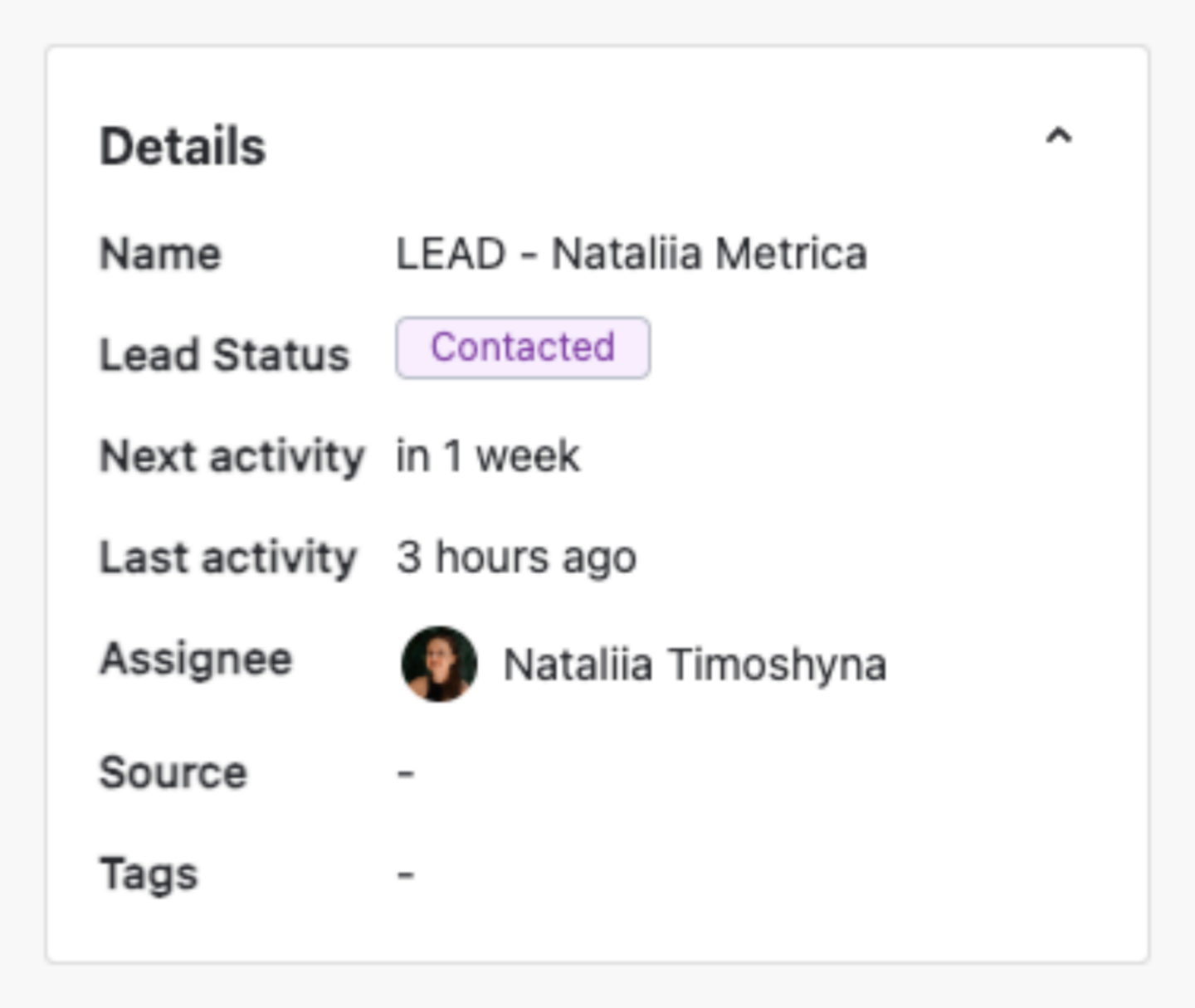


Sorting on the board

In Kanban view, **Sort by** offers **Next activity date** and **Last activity date**, and each card shows its next activity with the same **Overdue** flag when it has slipped.

On the record

A lead's Details panel shows both as relative values — *in 1 day*, *16 hours ago* — so the state of the lead is readable at a glance.



Finding work that has gone quiet

This is what the fields are really for. Open **Filters** → **Basic** and scroll to the activity blocks:

- **Next activity** — a preset plus a start/due date range, for “what is coming up this week”.
- **Last activity** — the same, plus **No activity in the last** (7, 14, 30 or 90 days) and a **Never** checkbox.

FILTERS

Start date

YYYY-MM-DD

Due date

YYYY-MM-DD

Next activity

Any

Start date

YYYY-MM-DD

Due date

YYYY-MM-DD

Last activity

No activity in the last

Any

Start date

YYYY-MM-DD

Due date

YYYY-MM-DD

No activity in the last 30 days combined with an open status is the stale-pipeline report most sales managers want: everything nobody has touched in a month. **Never** finds the ones that were never worked at all.

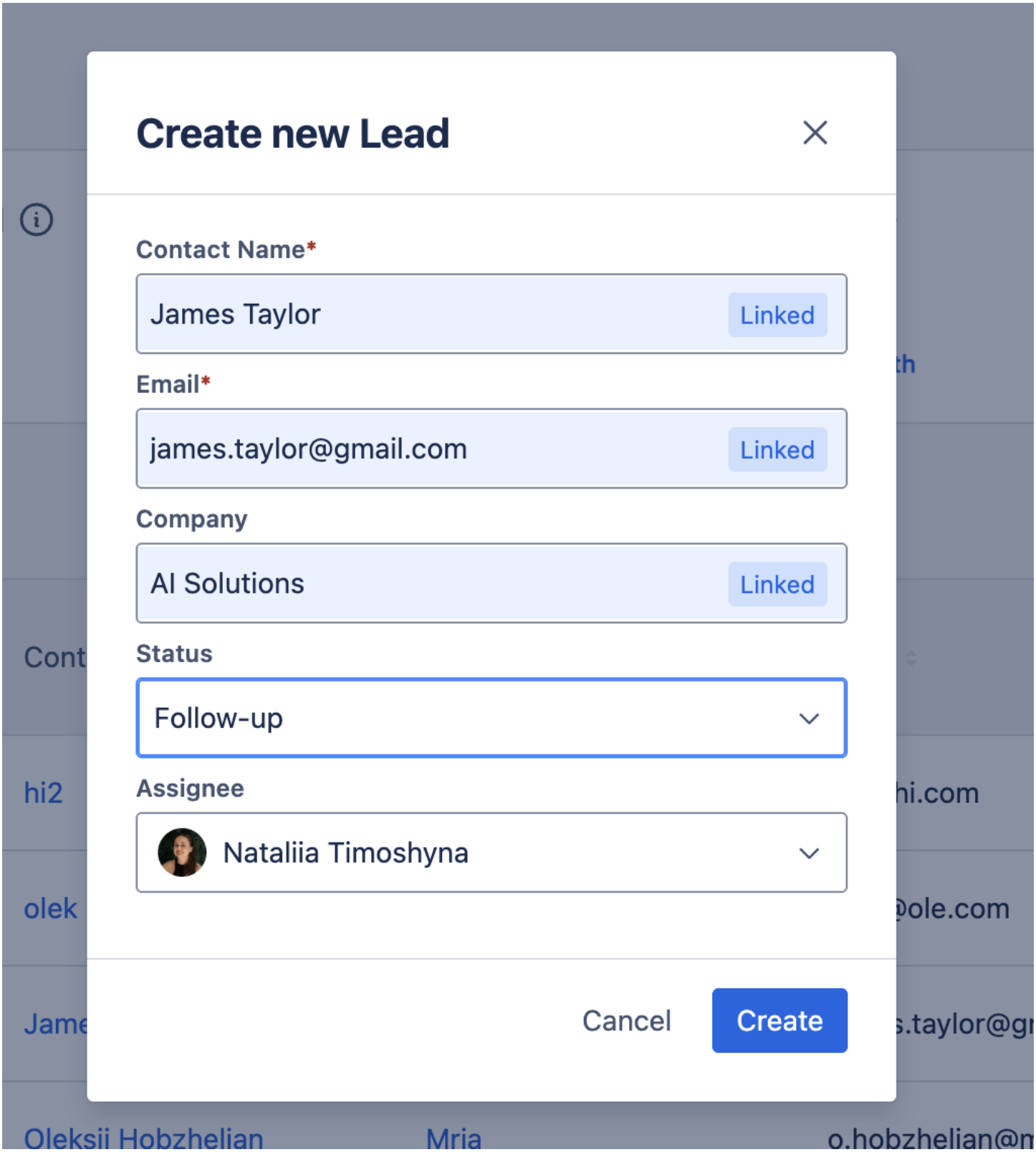
> Filters are staged until you press **Apply**. A selection you have made but not applied changes nothing — if the list looks wrong, check that you applied it.

3. Creating a New Lead

To create a new Lead:

1. Click **Create Lead**.
2. Fill in the fields:
   - **Contact Name** (required)
   - **Email** (required, accepts duplicates)
   - **Company** (optional)
   - **Status** (select from dropdown: e.g., *New, Follow-up, Junk, Lost*)
   - **Assignee** (select the user responsible for the Lead)
3. Click **Create** to save.

When entering a name, Mria CRM will suggest existing contacts/companies. If selected, the Lead will be **linked** to that contact automatically.



4. Importing Leads in Bulk

If you need to add multiple Leads at once, you can import them in bulk from a CSV or XLSX file.

Mria CRM will guide you through mapping your columns and values step by step, helping you review

duplicates and assign Leads to the right users.

> You can access the import tool either from the **Leads** section (Import Leads button) or from **Settings → Data Administration → Leads**.

See full instructions here: Leads Import.

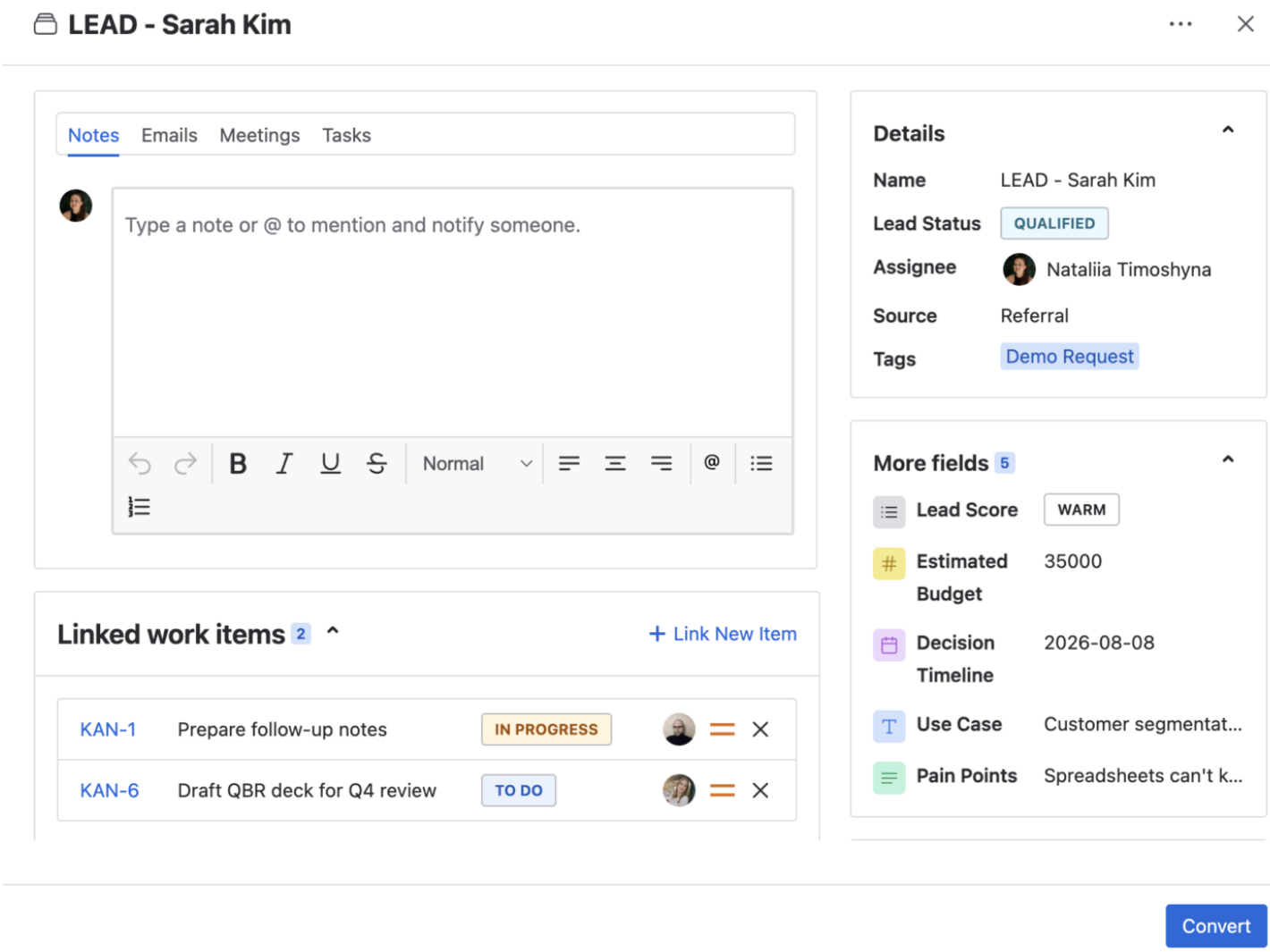
5. Lead Detail View

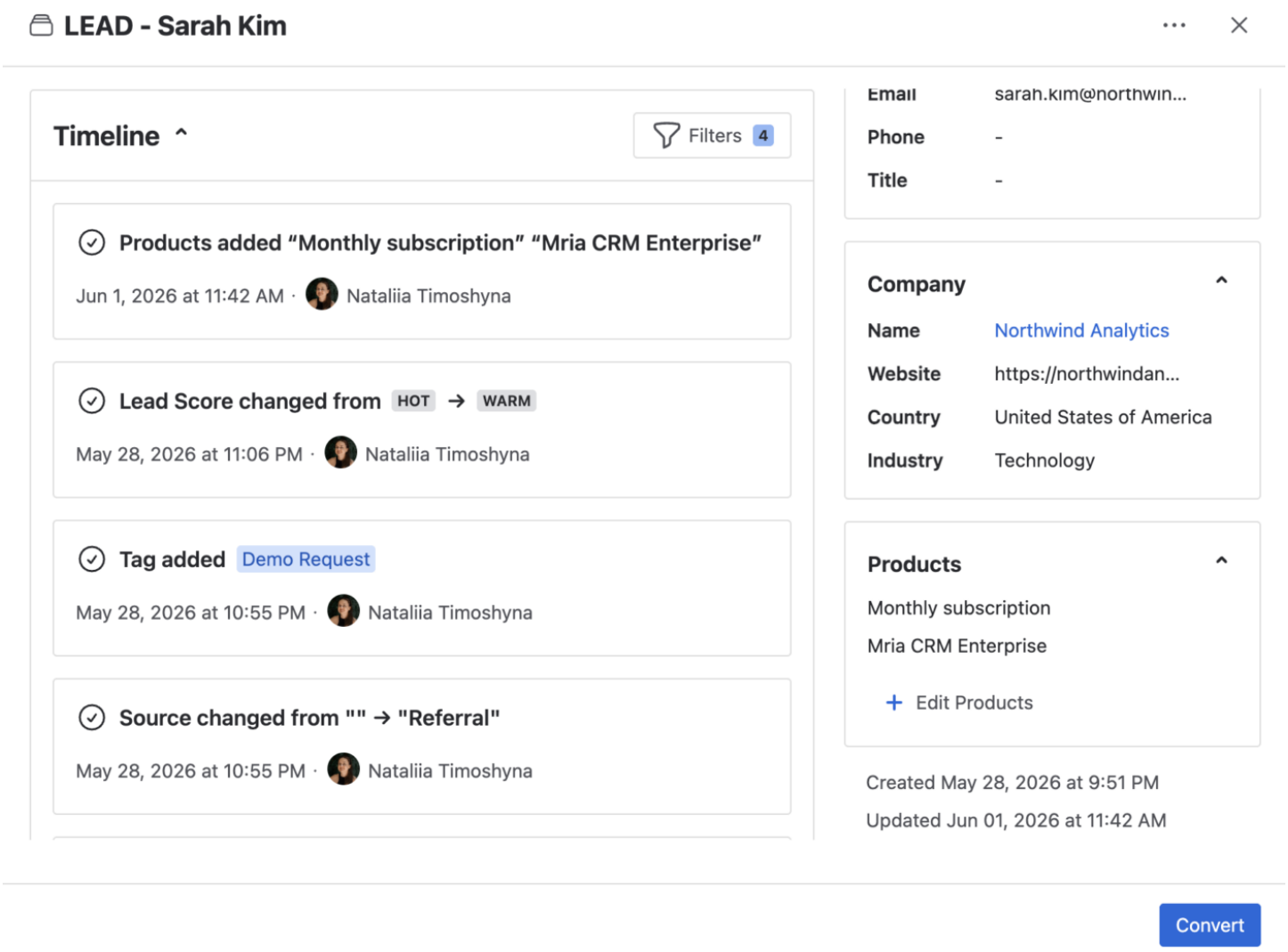
Clicking on a Lead opens the **Lead detail view**, where you can:

- See **Details** (Lead status, Assignee, Source, Tags).
- View or edit **Contact information** (name, email, phone, title).

> *Phone number can be entered in any format you prefer — for example, "+38 (097) 123 45 67 (after 5 PM)". The field accepts numbers, symbols, and notes to keep things flexible.*

- View or edit **Company information** (name, website).
- Add **Notes** and track them in the **Timeline**.
- Access additional tabs — **Meetings, Tasks, Files, Emails**, and **Jira links**. See Activities Breakdown for what each one does, and Gmail Integration / Outlook Integration for sending and syncing email from the Lead.
- The **Timeline** records important activities, such as when the Lead was created or updated.


LEAD - Sarah Kim
Notes
Emails
Meetings
Tasks
Type a note or @ to mention and notify someone.
Normal
Linked work items 2
+ Link New Item
KAN-1
Prepare follow-up notes
IN PROGRESS
KAN-6
Draft QBR deck for Q4 review
TO DO
Details
Name
LEAD - Sarah Kim
Lead Status
QUALIFIED
Assignee
Nataliia Timoshyna
Source
Referral
Tags
Demo Request
More fields 5
Lead Score
WARM
Estimated Budget
35000
Decision Timeline
2026-08-08
Use Case
Customer segmentat...
Pain Points
Spreadsheets can't k...
Convert



Arranging this page

Administrators can move, hide or collapse the blocks of the Lead page and reorder the fields in Details — in Settings → Layouts, or from ⚙ **Configure** at the foot of the side panel. See Layouts.

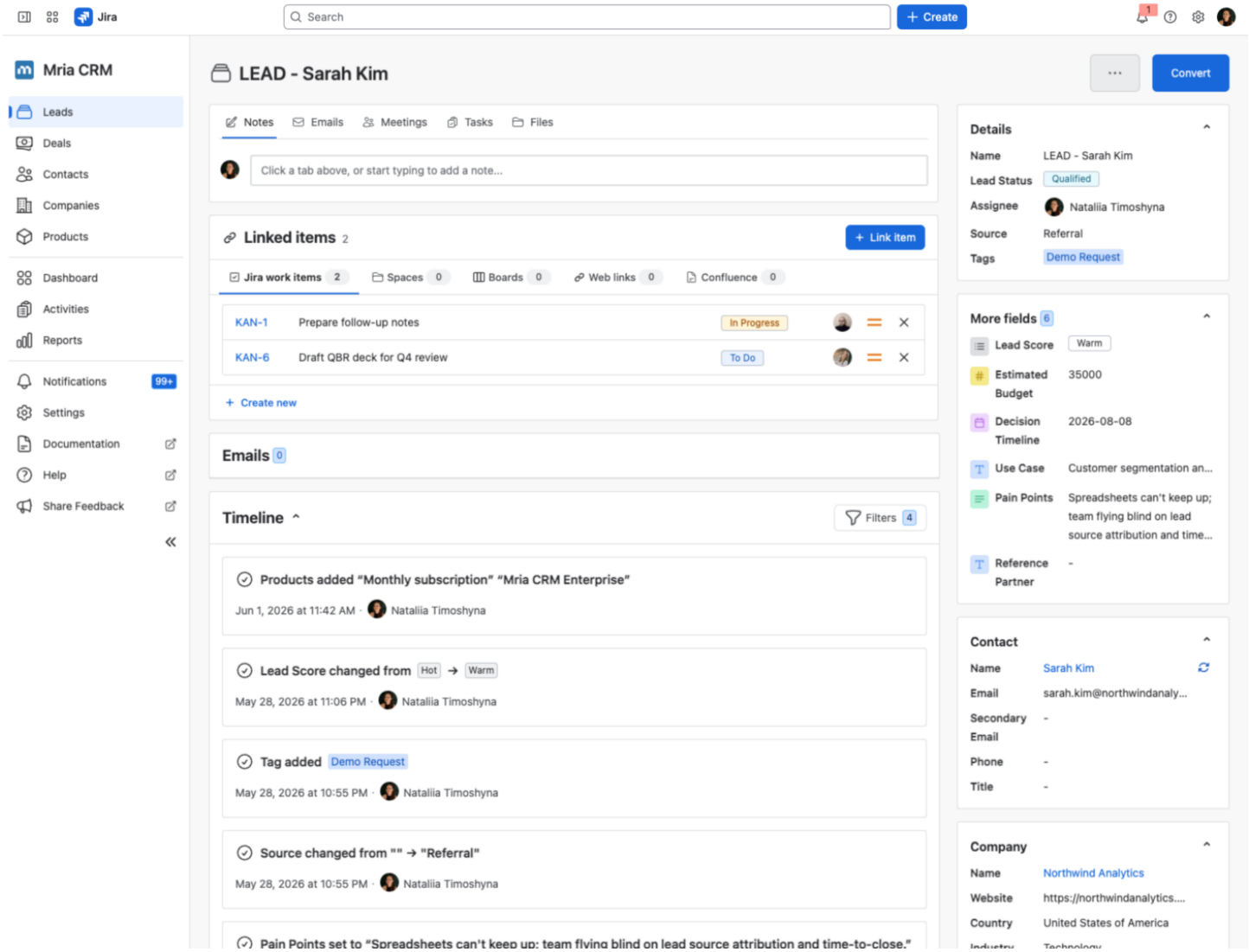
6. Custom Fields on Leads

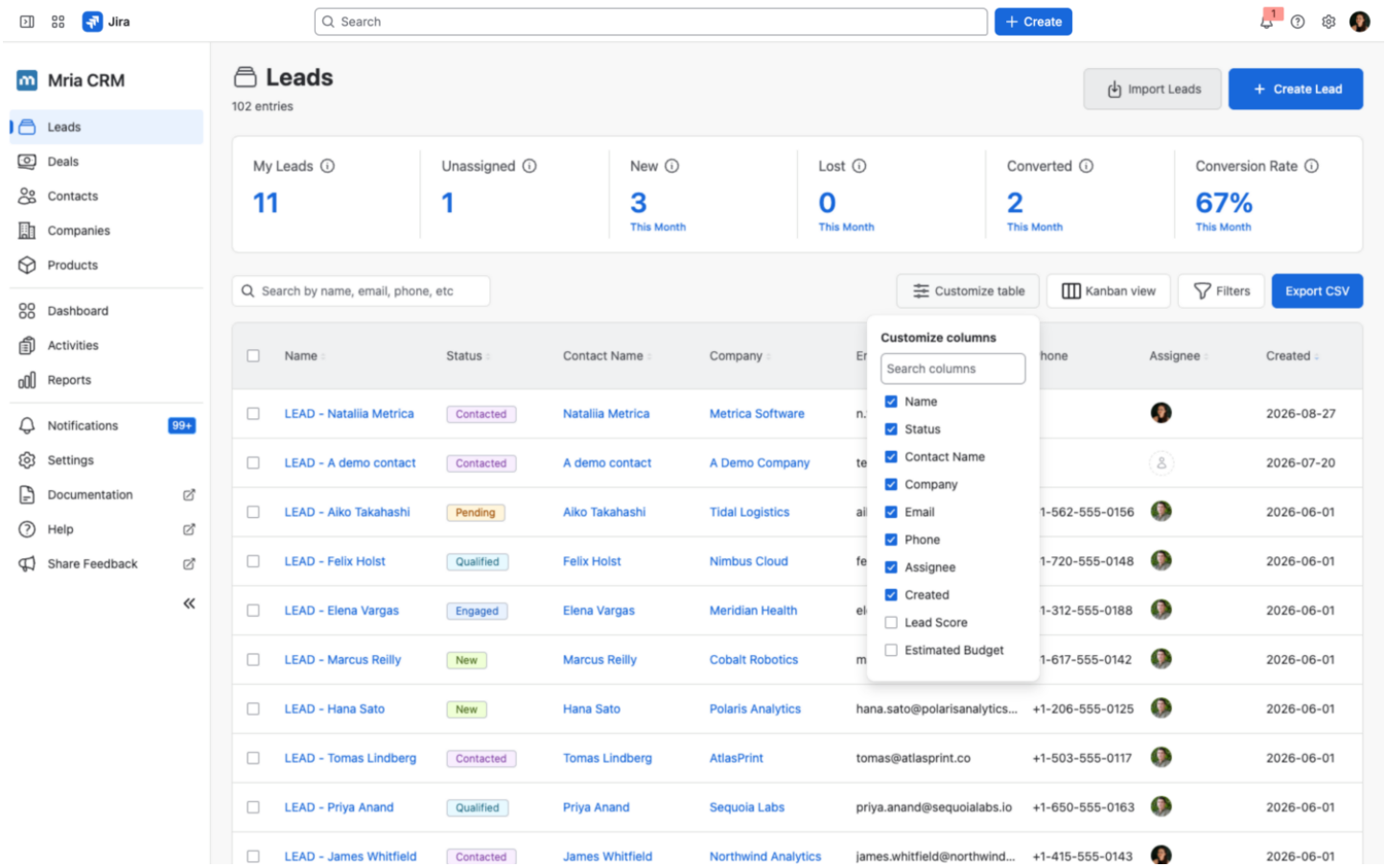
Custom fields let your team capture extra information on every Lead beyond the standard fields. For example, you can add **Lead Score** to track temperature, **Estimated Budget** to qualify opportunities earlier, or **Decision Timeline** to forecast when a Lead will close.

Custom fields are managed by administrators under **Settings → Custom Fields**. See Custom Fields for the full setup guide and field type reference.

Once a custom field is created on the Lead entity, it shows up in several places:

- **Lead detail view** — populated values appear in the **More fields** section on the right-hand panel. Click any field to edit inline.
- **Table view** — open the **Customize table** menu and toggle any custom field on to add it as an optional column.
- **Filters panel** — every custom field appears under the **Advanced** tab as a filterable criterion (see **Filtering Leads** below).
- **CSV export** — visible columns are included in the export, so custom fields show up in the CSV when they're toggled on in the table view.
- **Leads Import** — custom fields can be mapped during bulk import. See Leads Import.





Change log: Every edit to a custom field is recorded on the Lead's **Timeline** tab — who changed which field, when, and the value before and after. History is preserved even after a field is deleted, so you can always trace how a Lead evolved.

Carryover on conversion: When a Lead is converted into a Deal, custom fields with the same name and same type on both entities carry their values over automatically. See Lead to Deal Conversion for the full rule.

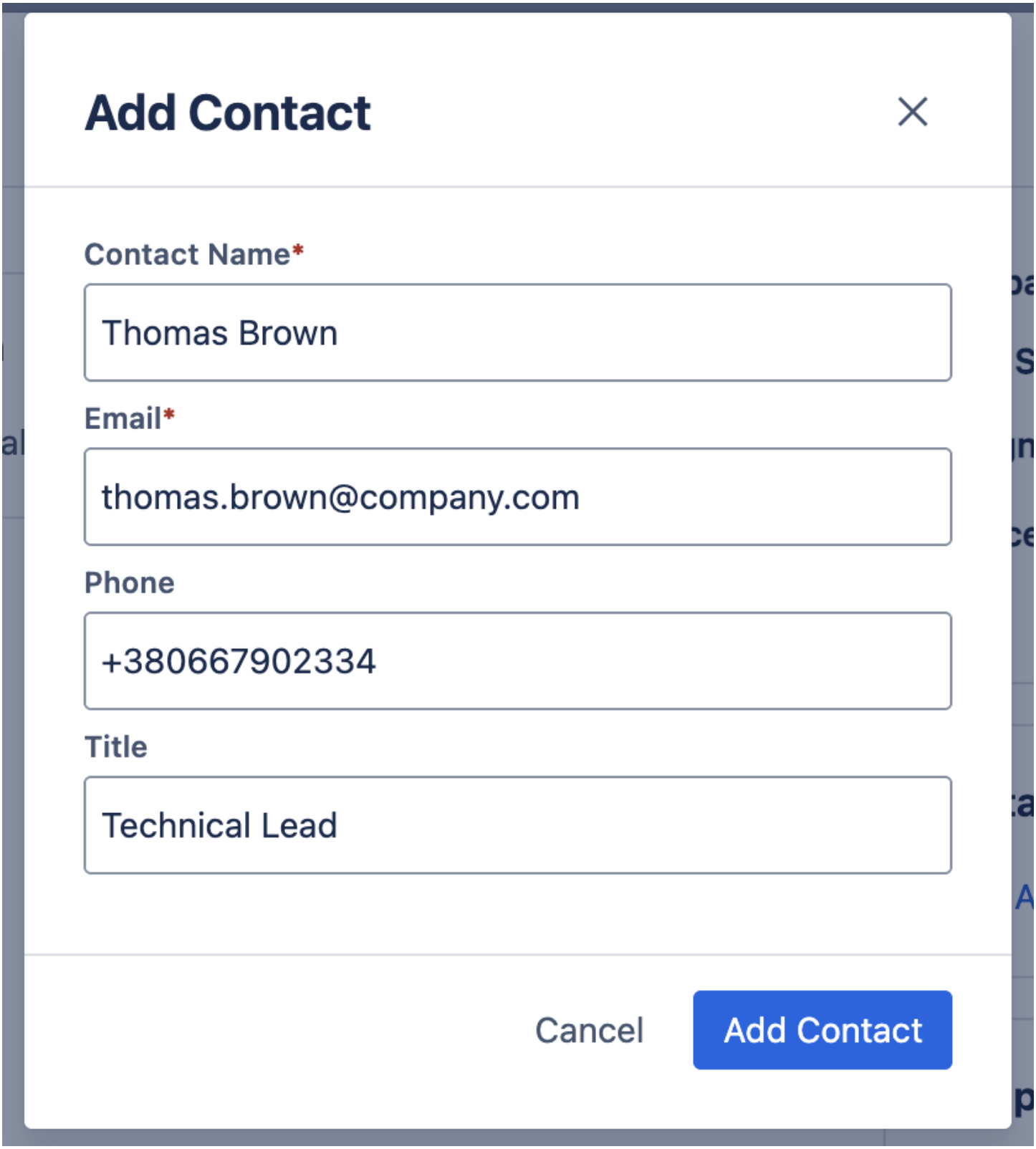
7. Linking Entities to a Lead

Leads can be enriched with additional information by linking them to existing or new entities:

Contacts

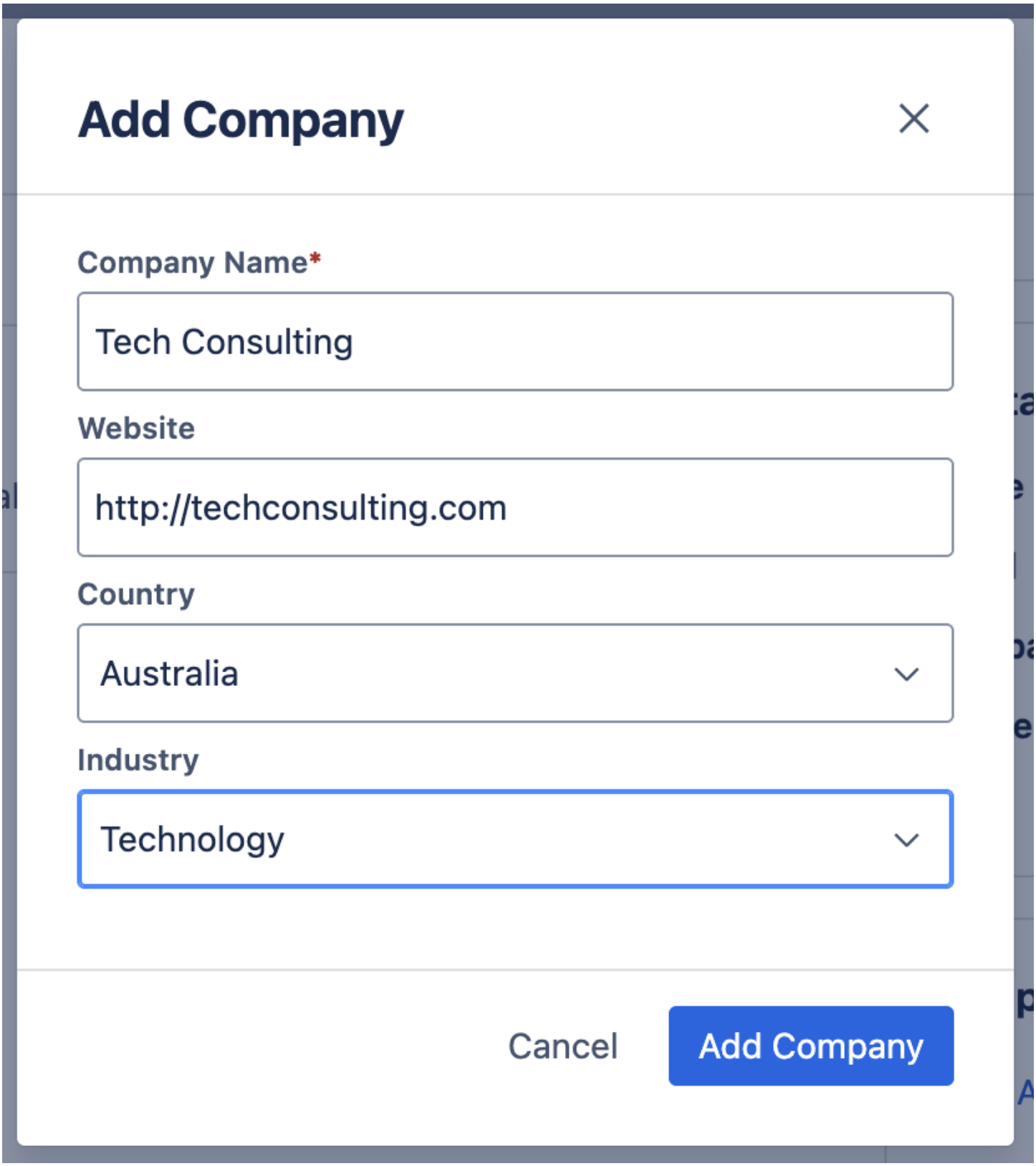
- You can add a **Contact** directly from the Lead detail view.
- When added, the Contact is created in the **Contacts** module and linked to this Lead.

- Fields include **Contact Name, Email, Phone, Title**.



Companies

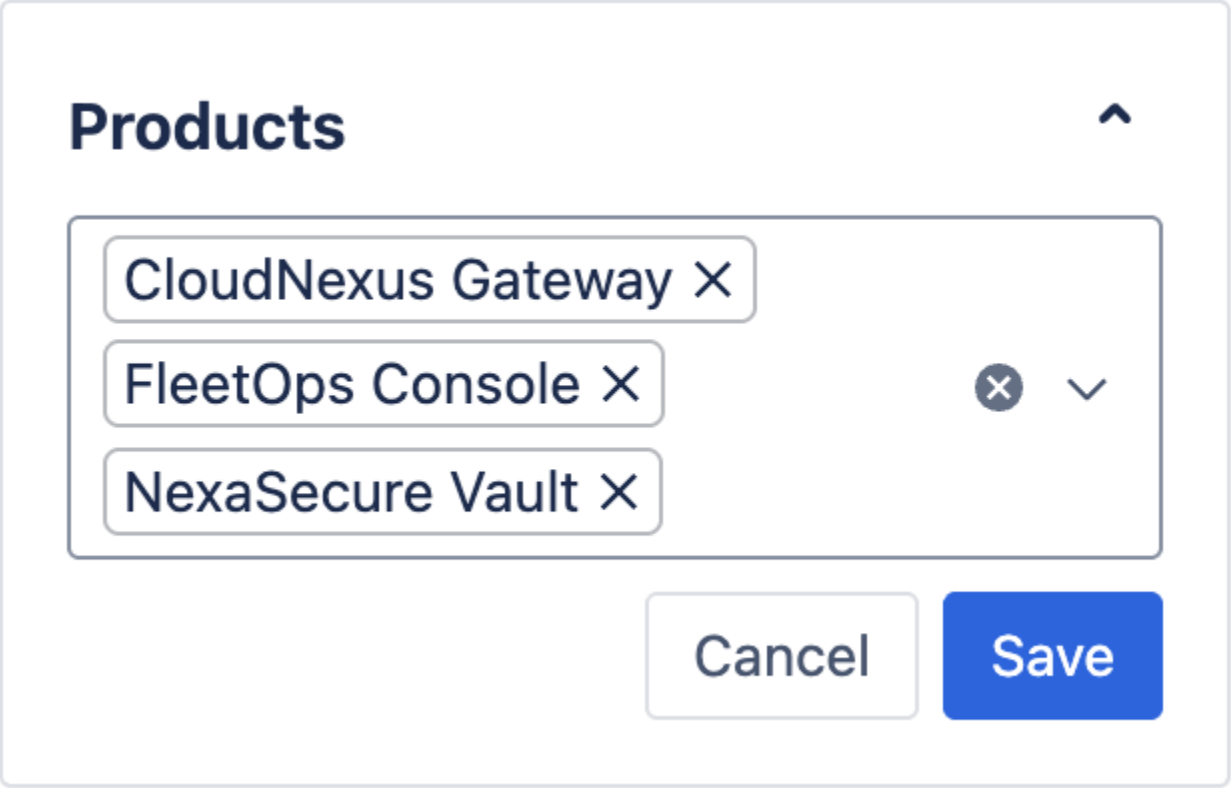
- You can add a **Company** directly from the Lead detail view.
- When added, the Company is created in the **Companies** module and linked to this Lead.
- Fields include **Company Name, Website, Country, Industry**.



Products

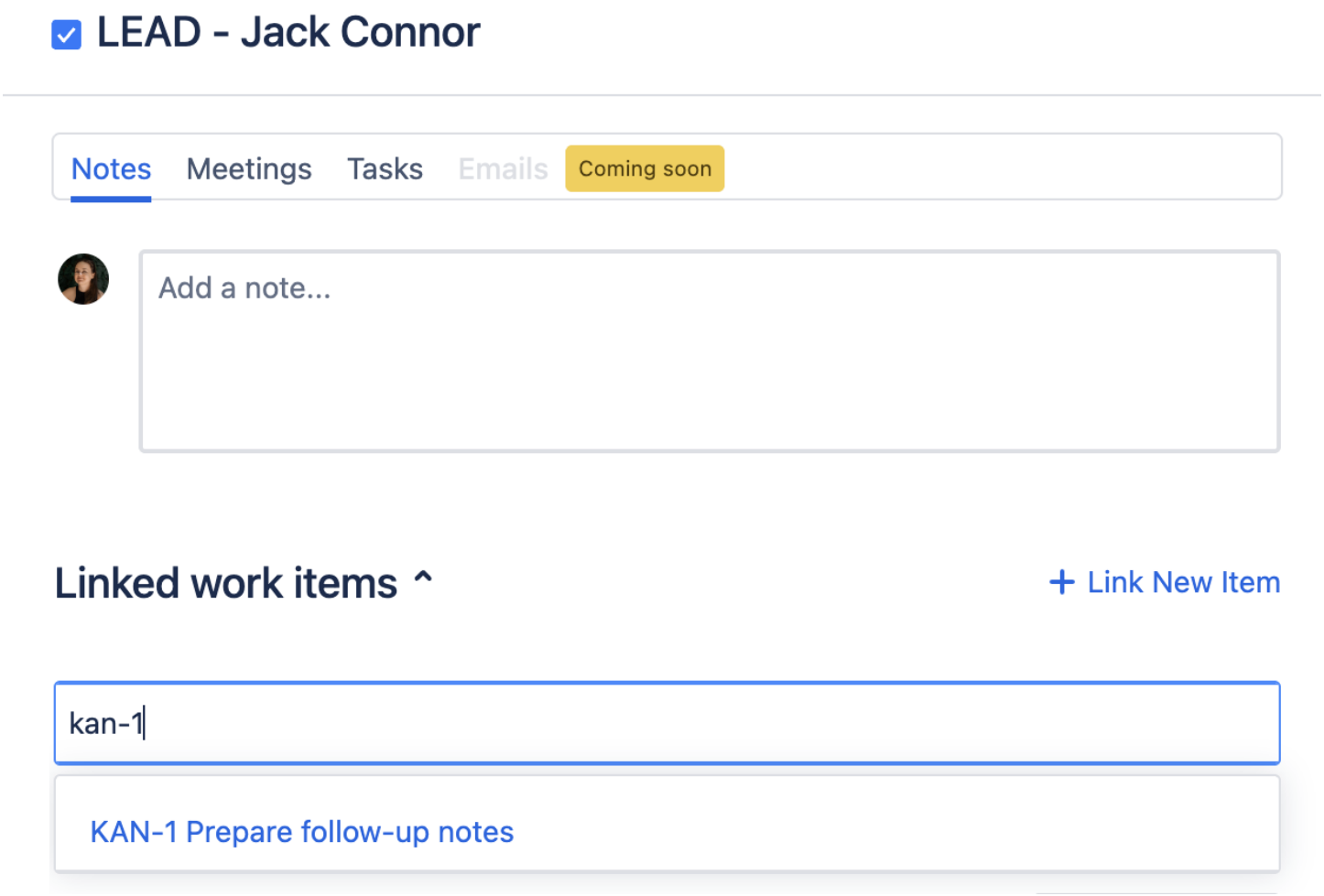
- You can link existing **Products** to a Lead.

- Products must already exist in the **Products** module.
- From the Lead view, select one or more Products from the dropdown list to associate them with the Lead.

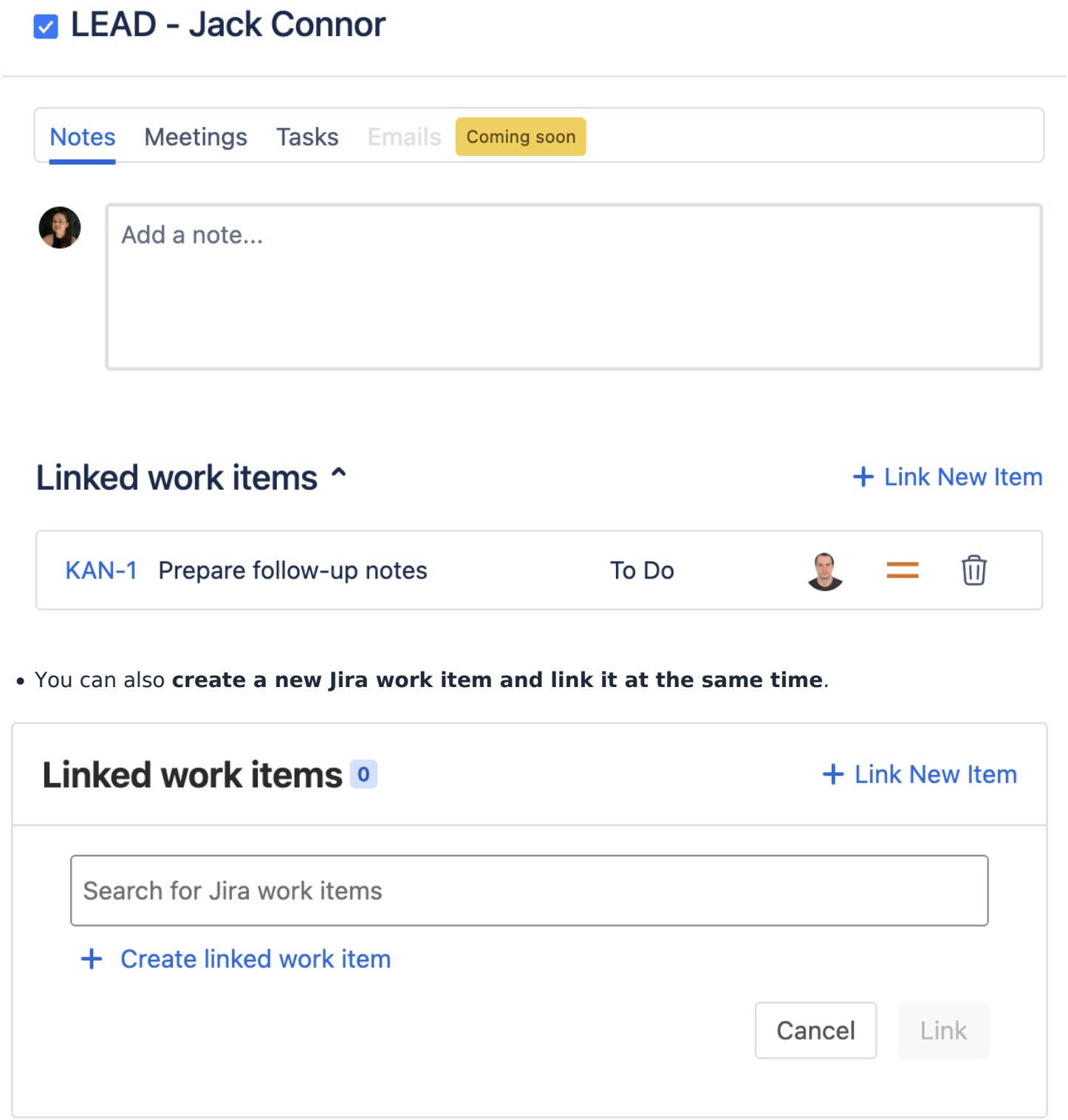


Jira work items

- You can link existing **Jira work items** (issues) to a Lead.
- Work items must already exist in Jira and be accessible to the user.
- From the Lead view, type the issue key (e.g., `KAN-1`) or search by summary to select one or more work items from the dropdown list.

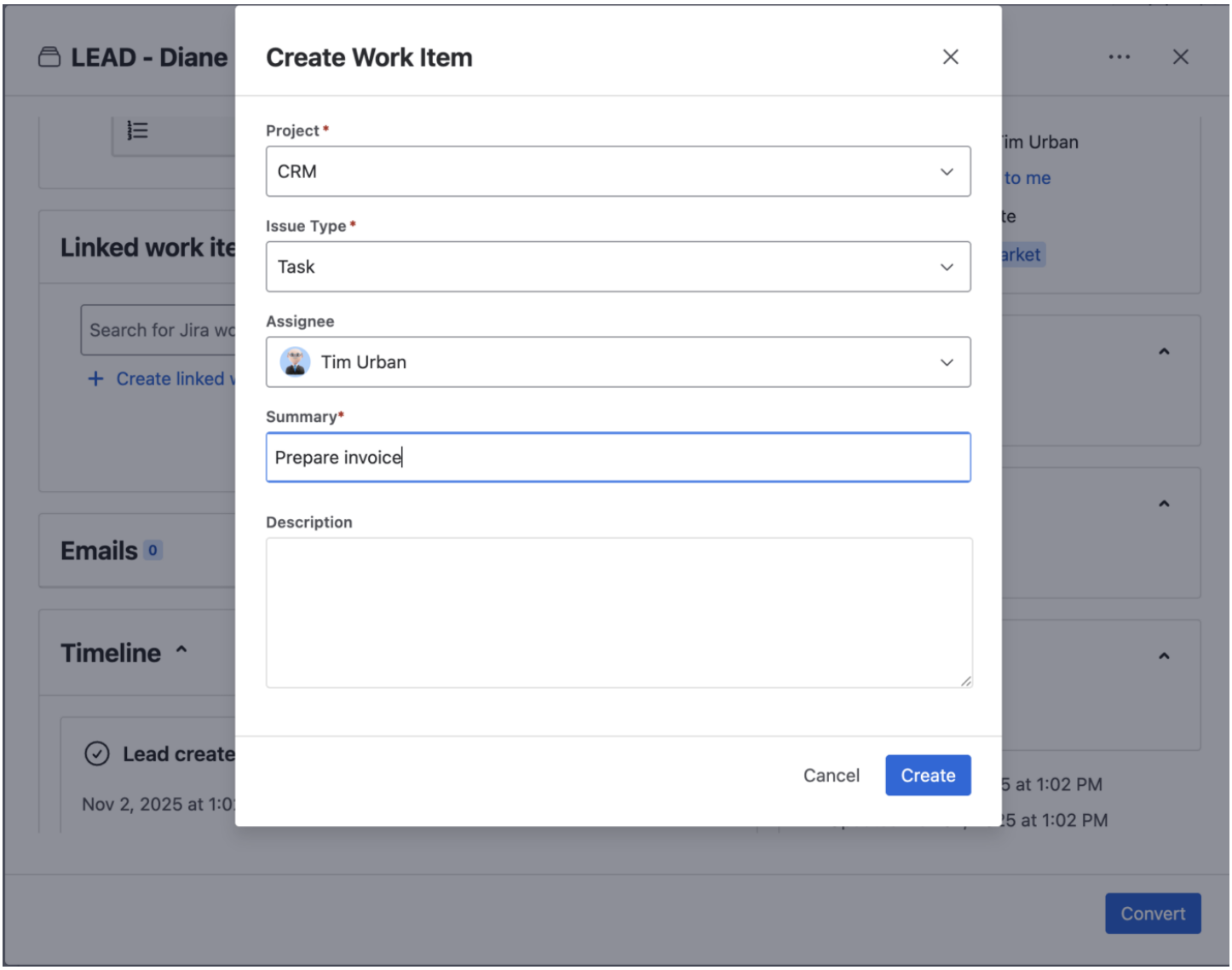


- Once linked, the work items are displayed under **Linked work items**, showing key details such as summary, status, priority and assignee.



- You can also **create a new Jira work item and link it at the same time**.

- Click **Create linked work item** below the search field, fill in the required details (Project, Issue Type, Summary, etc.), and click **Create**. The work item will be created in Jira and automatically linked to the Lead.



This is useful when the required work item doesn't exist yet, allowing you to create and associate it without leaving the CRM.

8. Lead Statuses

Leads can have different statuses to reflect their progress through the pipeline:

- **New** – a fresh Lead, not yet processed.
- **Follow-up** – requires further action or communication.
- **Contacted** – initial contact has been made with the Lead.
- **Nurturing** – the Lead is in an ongoing relationship-building phase, not ready to move forward yet.
- **Pending** – waiting for a response or outcome (e.g., awaiting client decision).

- **Engaged** – the Lead is actively responding and showing interest.
- **Qualified** – the Lead has been vetted and meets the criteria to move further in the pipeline.
- **Junk** – unqualified or irrelevant Lead.
- **Lost** – the Lead was pursued but the opportunity is no longer active (e.g., the Lead chose another vendor, stopped responding, or explicitly declined).
- **Duplicated** – the Lead is a duplicate of an existing record.
- **Converted** – the Lead successfully turned into a Deal (conversion flow covered in the next section).

Statuses **Lost, Junk, Duplicated, and Converted** are considered **Closed Leads**.
All other statuses are counted toward the **Open Leads** total. For example, in the **Contacts** section, users can see how many Open Leads are linked to each Contact.

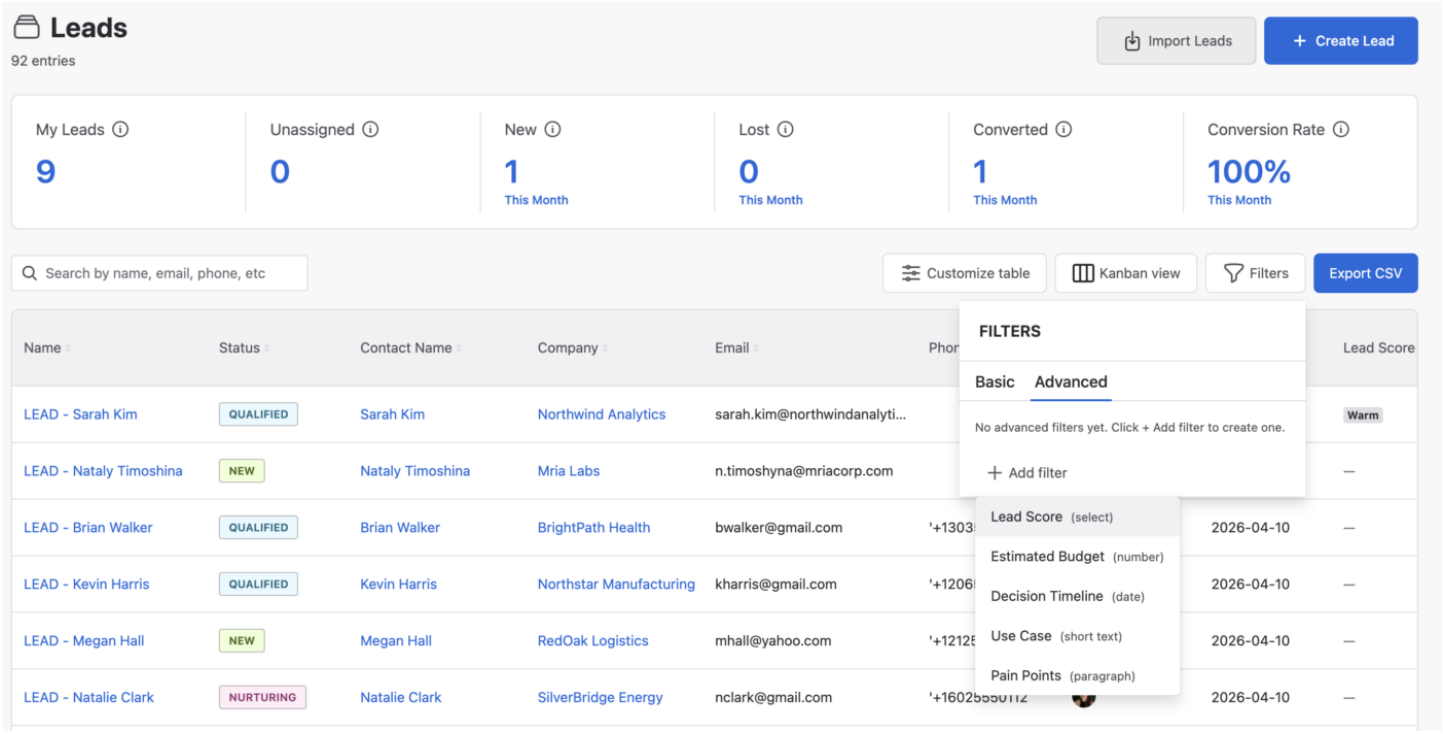
9. Filtering Leads

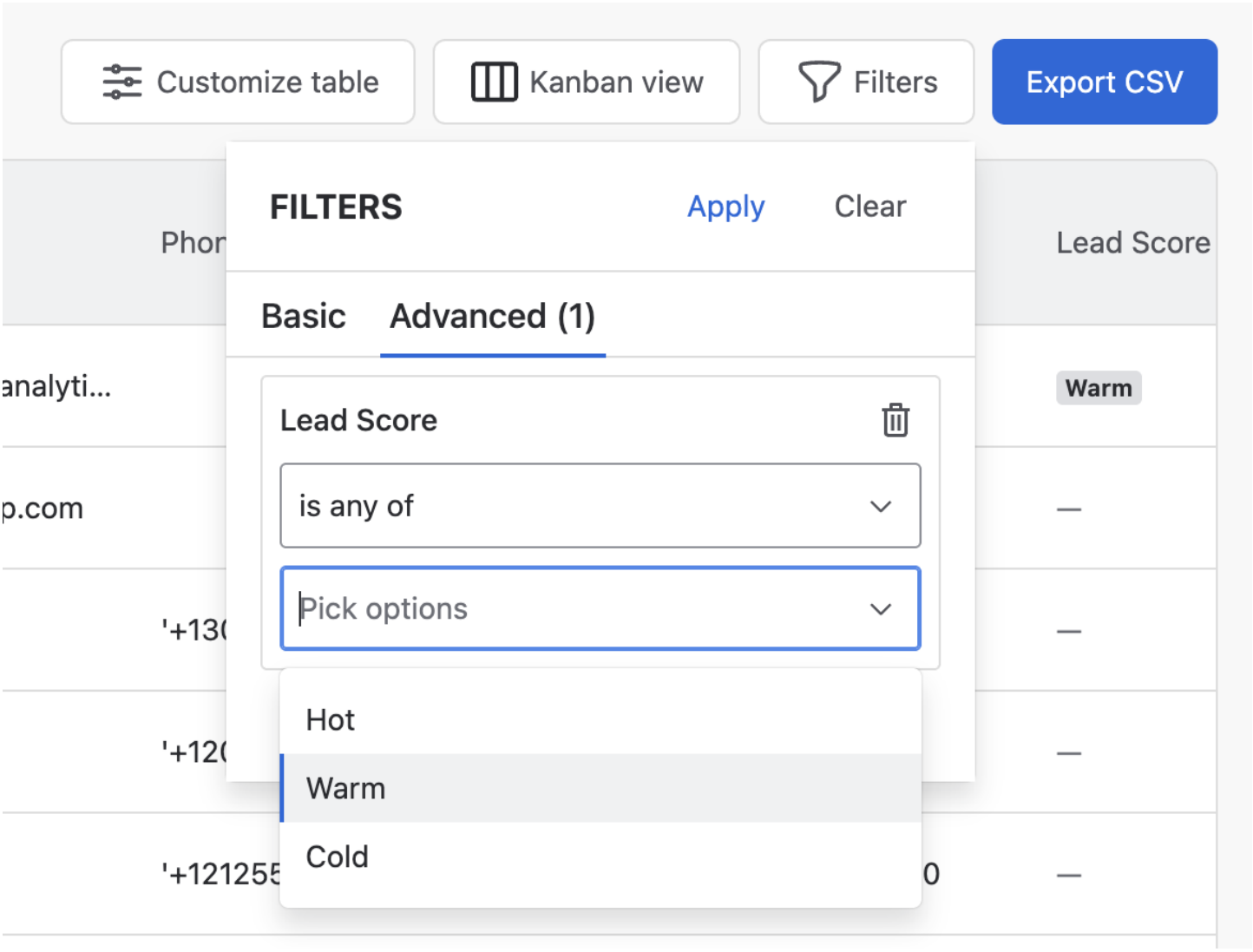
The **Filters** panel lets you quickly narrow down Leads by key criteria without affecting the underlying data. It has two tabs:

- **Basic** — the standard filter set, always available.
- **Advanced** — every custom field on the Lead is automatically available here as a filterable criterion. The available comparators depend on the field type (for example, dropdowns use **is any of**, numbers use **is greater than**, dates use **is on or before**).

Available Basic filters include:

- **Assigned to me** – show only Leads assigned to you.
- **Status** – filter by Lead status (e.g., Contacted, Engaged, Follow-up, Junk, Lost, etc.).
- **Assignee** – view Leads owned by specific team members.
- **Source** – filter based on Lead source.
- **Product** – show Leads linked to particular Products.
- **Created / Updated** – define date ranges to see Leads created or updated within a specific period.


Leads
92 entries
Import Leads
+ Create Lead
My Leads
9
Unassigned
0
New
1
This Month
Lost
0
This Month
Converted
1
This Month
Conversion Rate
100%
This Month
Search by name, email, phone, etc
Customize table
Kanban view
Filters
Export CSV
Name
Status
Contact Name
Company
Email
Lead Score
LEAD - Sarah Kim
QUALIFIED
Sarah Kim
Northwind Analytics
sarah.kim@northwindanalyti...
Warm
LEAD - Nataly Timoshina
NEW
Nataly Timoshina
Mria Labs
n.timoshyna@mriacorp.com
LEAD - Brian Walker
QUALIFIED
Brian Walker
BrightPath Health
bwalker@gmail.com
2026-04-10
LEAD - Kevin Harris
QUALIFIED
Kevin Harris
Northstar Manufacturing
kharris@gmail.com
2026-04-10
LEAD - Megan Hall
NEW
Megan Hall
RedOak Logistics
mhall@yahoo.com
2026-04-10
LEAD - Natalie Clark
NURTURING
Natalie Clark
SilverBridge Energy
nclark@gmail.com
2026-04-10
FILTERS
Basic
Advanced
No advanced filters yet. Click + Add filter to create one.
+ Add filter
Lead Score (select)
Estimated Budget (number)
Decision Timeline (date)
Use Case (short text)
Pain Points (paragraph)



Filters are optional and purely for convenience. They do not change the data itself, only how it's displayed.

10. Deleting a single Lead

To delete one Lead, open the `...` **menu in the top right corner** of a Lead full view and select **Delete**.

- **No business rule blocks it.** A Lead has no linked-record guard the way a Contact used on a Deal does, so deletion is never refused because of what the Lead is attached to.
- **You still need the permission.** Deleting requires the **Delete** grant on **Leads**, which only Administrator holds by default — **User** and **Viewer** both have Delete off on all five core entities. See Roles & Permissions.

- Once deleted, the Lead is gone from the system.

> Delete is granted per area, not per role in the abstract: User has no Delete on Leads, Deals, Contacts, Companies or Products, but does have it on **Emails** and **Email templates**.

[Leads: Deleting a single Lead]

11. Bulk actions

From the **table view** you can update or delete many Leads in one go — useful for re-assigning a departed colleague's pipeline, tagging a campaign, or clearing out sample data.

Selecting Leads

1. Narrow the list with **Filters** if you want to target a specific set.
2. Tick the checkbox on each row you want. The **header checkbox** selects every Lead **on the current page**.
3. A bulk actions bar appears at the bottom of the list, showing the count — for example **2 selected**. To go wider than the current page, click **Select all N** in that bar: it extends the selection to **every Lead matching your current filters**.
4. The **×** at the end of the bar clears the selection.

[Leads table with two rows ticked and the bulk actions bar showing 2 selected, Select all 101, Edit fields, and Delete]

> **The count in the bar is the number you're about to act on.** "*2 selected*" and "*101 selected*" sit in the same place and look almost identical — read it before you click anything, especially before Delete.

Edit fields

Click **Edit fields** to open a panel that applies your changes to every selected Lead.

Every field starts at **Keep as is**, so nothing is touched unless you deliberately change it. You can open the panel, set the one field you care about, and leave the rest alone.

Fields available on Leads:

- **Status**
- **Source**
- **Assignee**
- **Tags**
- **Products**

[Leads: Edit fields]

Source and **Assignee** offer a **Clear** link, which empties that field across the selection. **Status** does not — every Lead has to sit at some status, so there is nothing to clear it to; move the selection to another status instead.

Multi-value fields (Tags, Products) give you a choice of how to apply the change:

Option	What it does
Keep as is	Leaves the field untouched.
Add new	Adds the values you pick, keeping whatever is already there.
Replace all	Discards the existing values and sets only the ones you pick.
Find and remove	Removes the specific values you name, leaving the rest.
Remove all	Empties the field.

[Tags dropdown open in the Edit fields panel showing Keep as is, Add new, Replace all, Find and remove, and Remove all]

Below the fields, **Add links** attaches the same link to every selected Lead — a **Jira work item**, **Jira space**, **Jira board**, **Confluence page**, or **Web link**.

Click **Next** to review, then confirm to apply.

> Changing a field in bulk is recorded on each Lead's **Timeline** just like a manual edit, so a bulk re-assignment stays traceable per record.

Delete

Click **Delete** in the bulk actions bar and confirm.

> Bulk delete is **permanent** and cannot be undone. Review your filters and the selected count before confirming.

Bulk actions work the same way on Deals, Contacts, Companies, and Products, each with its own set of editable fields. On those entities some records are protected from deletion — for example, a Contact still used on a Deal. In that case the operation **skips the protected record and continues with the rest** instead of failing, so one blocked record never stops the whole batch.

Next Steps: After Leads, we'll cover **Deals** (turning qualified Leads into opportunities).