



USER GUIDE

How to use PakkaLead

The real estate CRM for agents and agencies.

Step-by-step guides with screenshots from the app.

Online version: pakkalead.in/help · Support: support@pakkalead.in
Screenshots use a demo workspace - all names and numbers are fictional.

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One-click WhatsApp messages

Ready-written WhatsApp messages for every lead, at the right moment. Check it, tap Send – done.

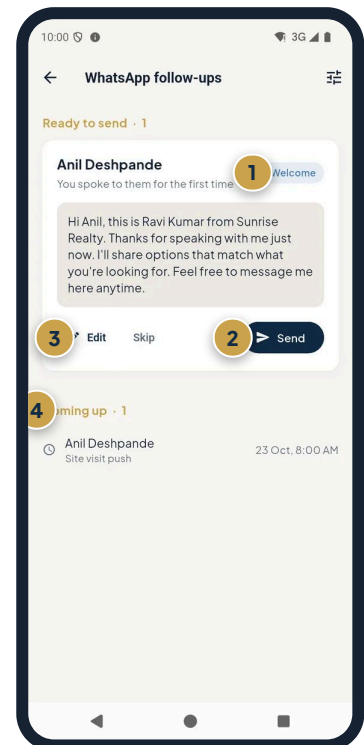
1 Your messages are written for you

After a call with a new lead, PakkaLead writes the **Welcome** message **1** with your name and company already in it. Days later it lines up the next one – a **Site visit push**, a weekly follow-up, a thank-you after a visit.

Open **WhatsApp** from Quick actions on the home screen. Everything **Ready to send** is at the top.

Tap **Send** **2** and WhatsApp opens with the message typed – just press send. **Edit** **3** changes the words first; **Skip** drops it.

Coming up **4** shows what is scheduled next and when.

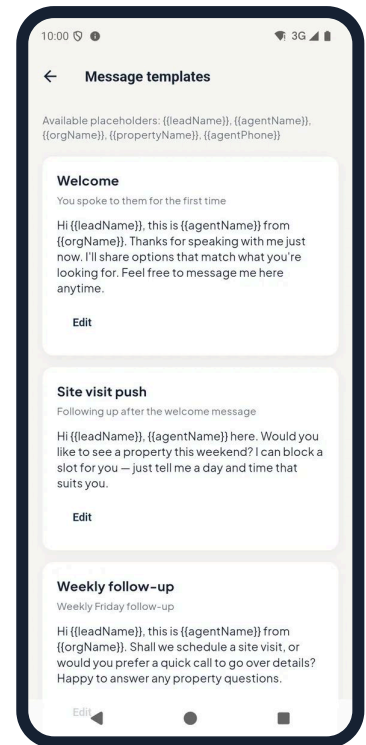


WhatsApp follow-ups ready to send

2 Make the messages sound like you

Tap the settings icon on that screen to open **Message templates**. Each message can be edited once and is used for every lead from then on.

Placeholders such as {{leadName}}, {{agentName}} and {{orgName}} are filled in automatically for each lead.



WhatsApp message templates

GOOD TO KNOW

- Messages go from your own WhatsApp, so customers see your number and reply to you directly.
- A lead who has gone quiet keeps getting a gentle weekly nudge until they reply or you close the lead.

Follow-up reminders and alerts

PakkaLead tells you who to call before a lead goes cold - you never have to remember.

1 Reminders on your phone

You get a notification before every follow-up and site visit, and the moment a lead is assigned to you.

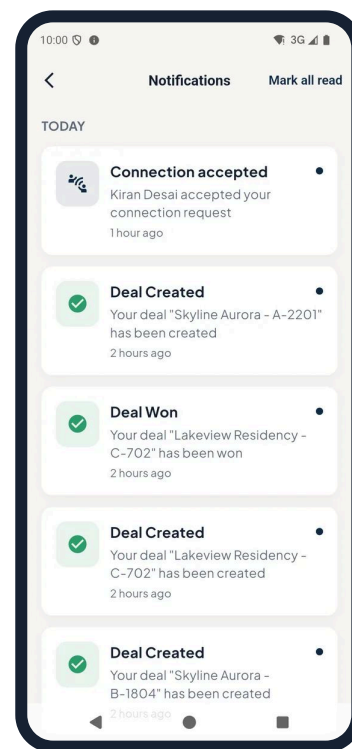
Hot lead going cold warns you when a hot lead hasn't been contacted for 48 hours, so you can call before they move on.

Turn on **Phone calendar** in Settings and your follow-ups and visits also appear in your phone's calendar - alerts arrive even when PakkaLead is closed.

2 Every update in one place

The bell on the home screen lists your updates: new and won deals, accepted connections, assigned leads and more. Tap one to open it.

On the home screen, **Today's Agenda** and the **Follow-ups** card show what is due today and what is overdue.



Notifications

GOOD TO KNOW

- See **Follow-ups** (pakkalead.in/help/follow-ups) to schedule and complete them.

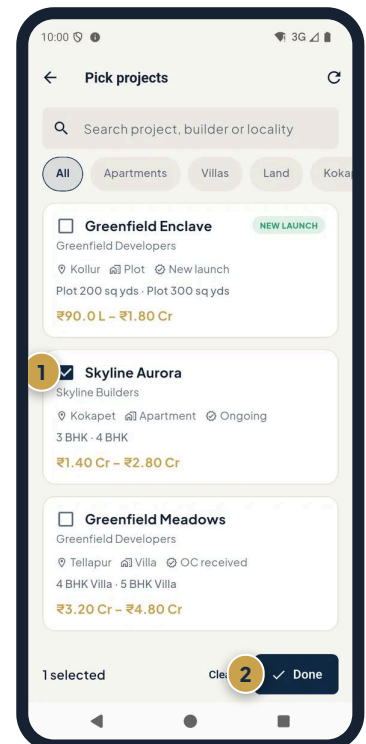
Register a lead with the builder and share projects in one tap

Send your customer the projects that fit them, and register the lead with each builder's channel-partner desk at the same time - so the commission is yours.

1 Pick the projects

Open the lead and tap **Send project link** in **Project links**.

Tap **Pick**, tick the projects **1** that match your customer and tap **Done** **2**.



Pick projects for the customer

2 Register with the builder

Keep **Register ... with the builder** ticked **1**. PakkaLead emails each builder's CP desk with the customer's details from your company mailbox and records the claim - proof that you brought this customer.

Choose whether to **Show prices** **2** on the customer's page, then tap **Create link & register** **3**.

Register the lead with the builder

3 Share with the customer in one tap

You get one link to a clean page with only the projects you picked. Tap **WhatsApp** **1** to send it to your customer, or **Copy link** **2**.

The builder card **3** shows the registration. If a builder has no email saved, it is recorded and you can send it yourself with the WhatsApp or Email buttons there.

Links expire on their own after the days you choose.

Share the project link with the customer

GOOD TO KNOW

- Connect your company mailbox once in **Profile → Email** so registrations go out from your own address.
- Each builder's desk is saved once under **Builders**; every project of that builder uses it.

Install and sign in

Sign in with your phone number and a code sent on WhatsApp. There is no password.

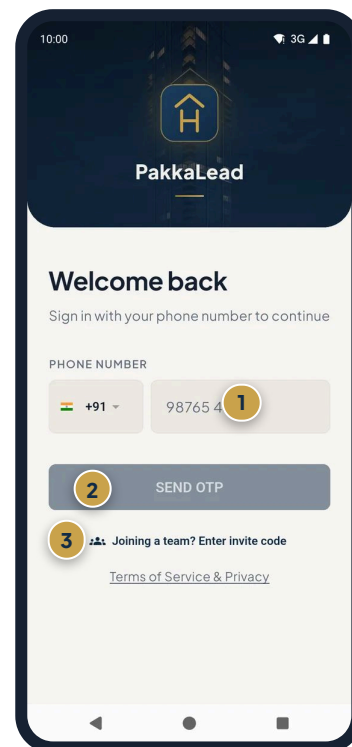
1 Enter your phone number

Install PakkaLead from Google Play and open it. After the welcome slides you reach the sign-in screen.

Type your 10-digit mobile number **1**. Change the country code only if your number is not Indian.

Tap **SEND OTP** **2**. A 6-digit code arrives on WhatsApp from the PakkaLead business number.

If your company has already added you to its team, just sign in with that number - you land in the team straight away. Only use **Joining a team? Enter invite code** **3** if your admin gave you a code.

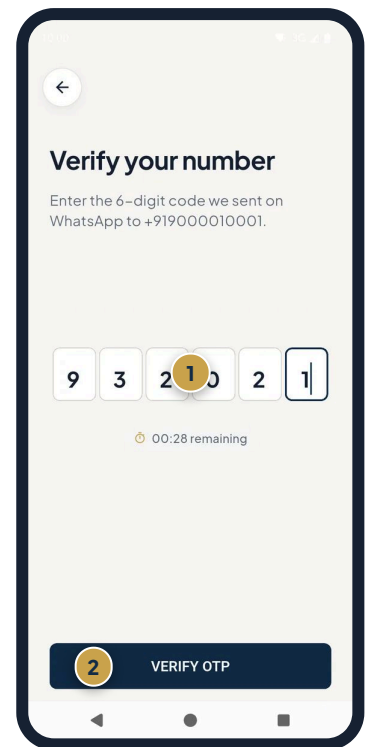


Sign-in screen with phone number field

2 Enter the code

Type the 6-digit code from WhatsApp into the boxes **1** and tap **VERIFY OTP** **2**.

The code is valid for 10 minutes. If it does not arrive, wait for the timer and request a new one.



Code entry screen

GOOD TO KNOW

- Signing in on a new phone moves your account there – your leads are stored in your account, not on the phone.

Complete your profile

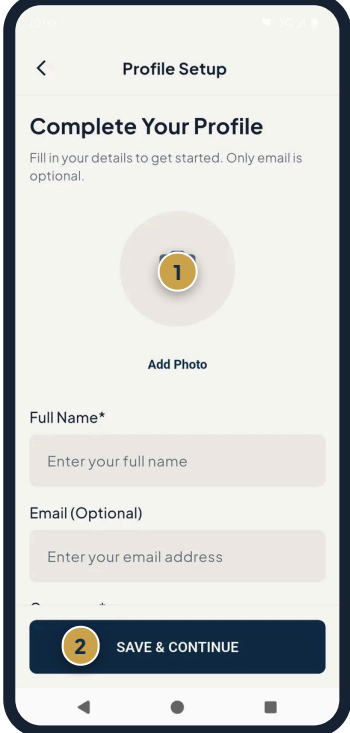
New accounts fill in a short profile before they start. Every field except email is required.

1 Fill in your details

Add a photo **1** (optional) so other agents recognise you.

Fill in **Full Name**, **Company**, **City**, **Experience** and a one-line **Bio**.
Email is optional.

Tap **SAVE & CONTINUE** **2**.



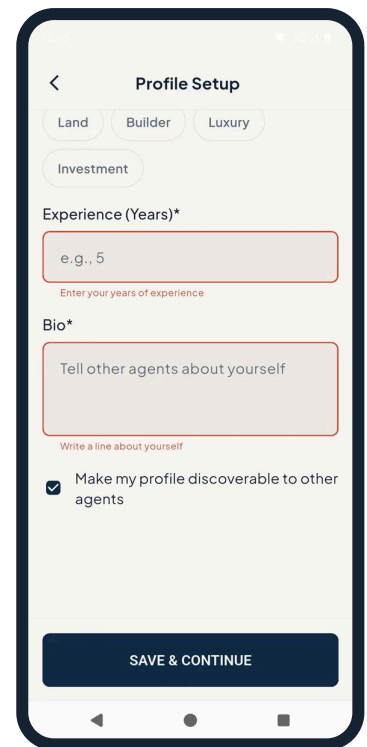
The screenshot shows a mobile app interface for 'Profile Setup'. At the top, there's a back arrow and the title 'Profile Setup'. Below that, the heading 'Complete Your Profile' is followed by a subtext: 'Fill in your details to get started. Only email is optional.' A large circular placeholder with a yellow circle and the number '1' is centered, with the text 'Add Photo' underneath it. Below this, there are two text input fields: 'Full Name*' and 'Email (Optional)'. The 'Full Name*' field has a placeholder text 'Enter your full name'. The 'Email (Optional)' field has a placeholder text 'Enter your email address'. At the bottom, there is a dark blue button with a yellow circle and the number '2' followed by the text 'SAVE & CONTINUE'. The mobile status bar at the top shows the time as 10:10 and battery level at 90%.

Profile setup form

2 If a field is missing

Missing fields are outlined in red with a short message underneath. Fill them in and save again.

You can change any of these later from **Profile → Edit profile**.

A mobile app screenshot of the 'Profile Setup' screen. At the top, there's a back arrow and the title 'Profile Setup'. Below the title are four tabs: 'Land', 'Builder', 'Luxury', and 'Investment'. The 'Experience (Years)*' field is highlighted with a red border and contains the placeholder text 'e.g., 5'. Below it, a red message says 'Enter your years of experience'. The 'Bio*' field is also highlighted with a red border and contains the placeholder text 'Tell other agents about yourself'. Below it, a red message says 'Write a line about yourself'. There is a checkbox labeled 'Make my profile discoverable to other agents' which is checked. At the bottom, there is a dark blue button labeled 'SAVE & CONTINUE'. The screen is framed by a dark blue border.

Profile setup showing required-field errors

Allow reminders, contacts and calendar

Three optional permissions that let PakkaLead remind you and save you typing.

1 Set up your day

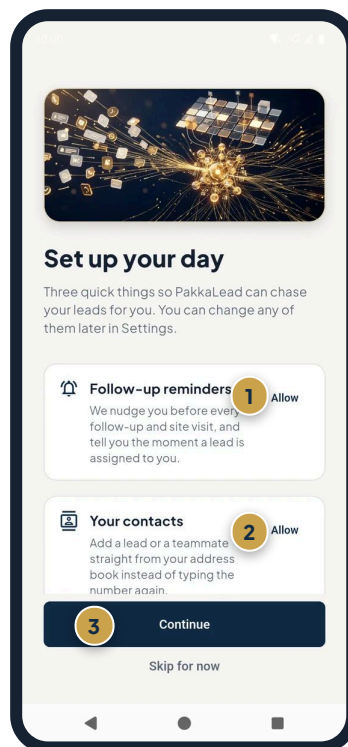
Follow-up reminders 1 -

notifications before each follow-up and site visit, and when a lead is assigned to you.

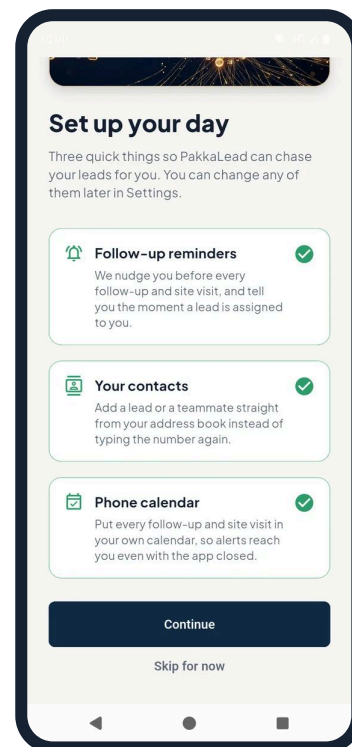
Your contacts 2 - pick a lead or teammate straight from your address book.

Phone calendar - puts follow-ups and site visits in your phone's calendar, so alerts arrive even when PakkaLead is closed.

Tap **Allow** next to each one, then **Continue 3**. Each item you allow turns green.



Set up your day permissions screen



All three permissions allowed

GOOD TO KNOW

- Skipped one? Turn it on later from **Profile → Settings**.

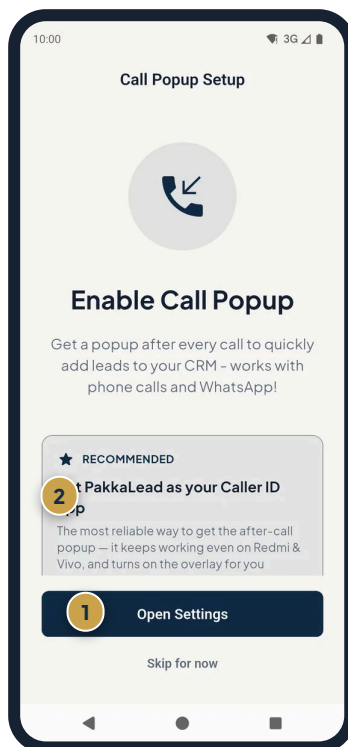
Turn on the after-call popup

After every call PakkaLead offers to save the number as a lead, or to add a note to an existing lead.

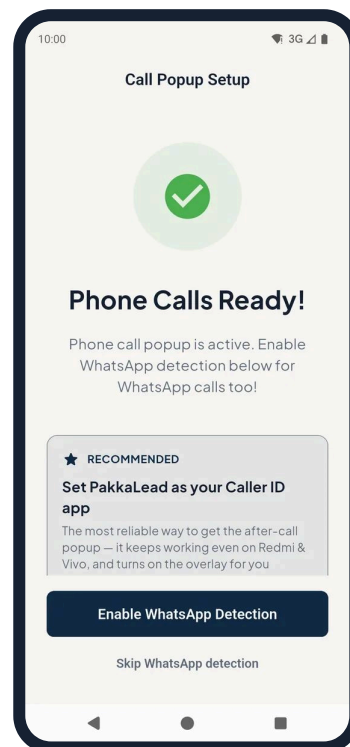
1 Allow PakkaLead to appear after calls

On **Enable Call Popup**, tap **Open Settings** ¹. Android opens **Display over other apps** - find PakkaLead and switch it on, then come back.

Recommended: **Set PakkaLead as your Caller ID app** ² keeps the popup working on phones that close background apps (Redmi, Vivo and others).



Call popup setup screen



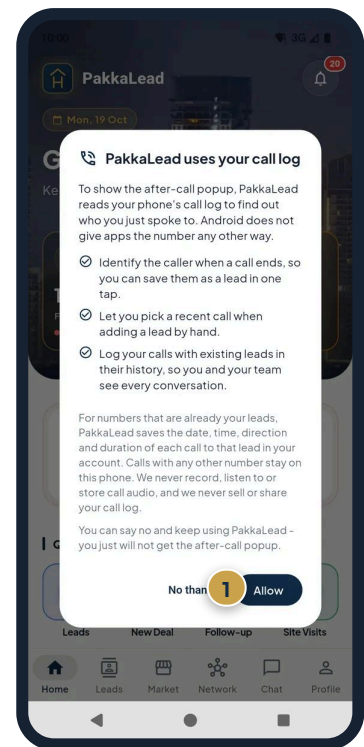
Phone calls ready confirmation

2 Allow the call log

When you reach the home screen, PakkaLead explains how it uses your call log before Android asks. Read it, then tap **Allow** ¹.

Calls with numbers that are already your leads are logged in that lead's history. Calls with any other number stay on your phone. Call audio is never recorded.

You can tap **No thanks** and keep using PakkaLead - you just won't get the popup.



Call log explanation dialog

GOOD TO KNOW

- WhatsApp calls can show the popup too: tap **Enable WhatsApp Detection** on the same screen and allow notification access.

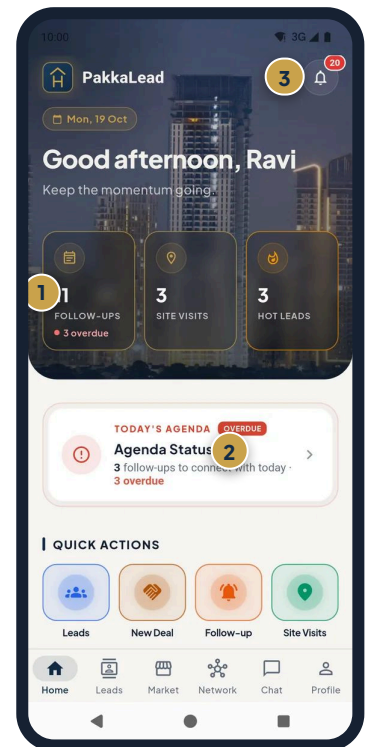
The home screen

Today's work at a glance, shortcuts to everything, and your business numbers.

1 Today

The three cards **1** show follow-ups due (with how many are overdue), today's site visits and your hot leads. Tap a card to open the list.

Today's Agenda **2** summarises what to do next. The bell **3** holds your notifications.



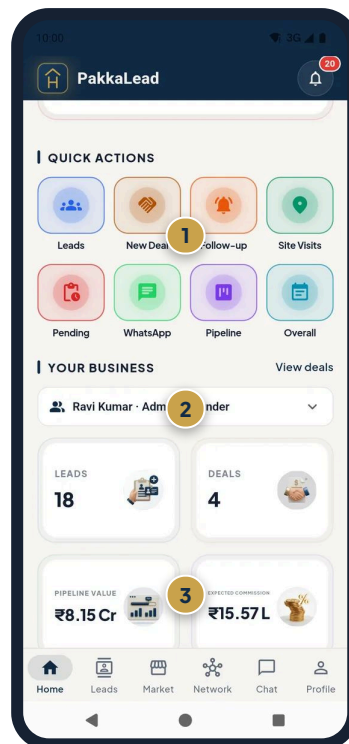
Home screen

2 Quick actions and your business

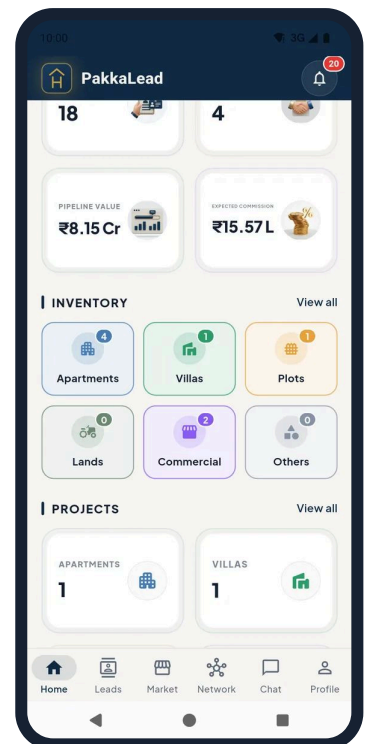
Quick actions 1 jump straight to adding a deal or follow-up, site visits, pending work, the WhatsApp queue and the pipeline board.

Under **Your Business**, admins and managers can switch 2 between their own numbers, one teammate's, or the whole team.

Pipeline Value and **Expected Commission** 3 add up all your deals. Tap them to open Deals and Commissions.



Quick actions and business stats



Inventory, projects and team on the home screen

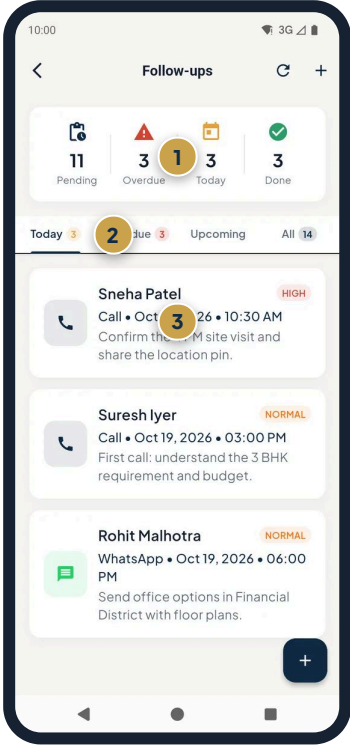
Follow-ups

Schedule calls, WhatsApps, emails and meetings, and mark them done.

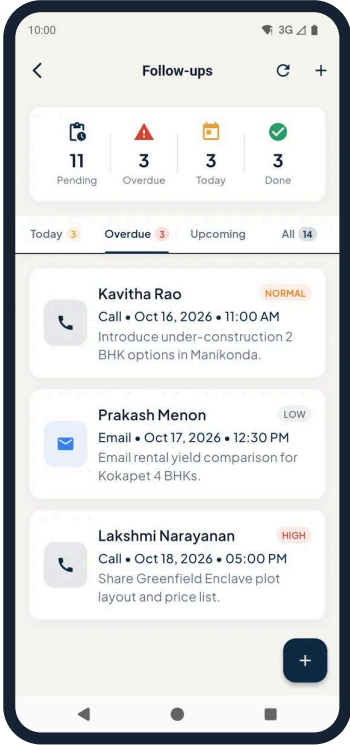
1 See what's due

Open **Pending** from the home screen. The summary **1** counts pending, overdue, today and done.

Switch between **Today**, **Overdue**, **Upcoming** and **All** **2**. Tap a follow-up **3** to see it.



Follow-ups list

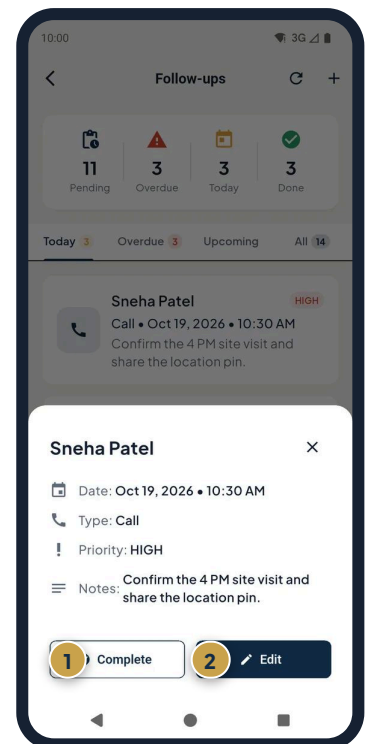


Overdue follow-ups

2 Complete or change a follow-up

Tap **Complete** ¹ once you have spoken to the lead - you can record the outcome, and a good outcome moves the lead forward in the pipeline.

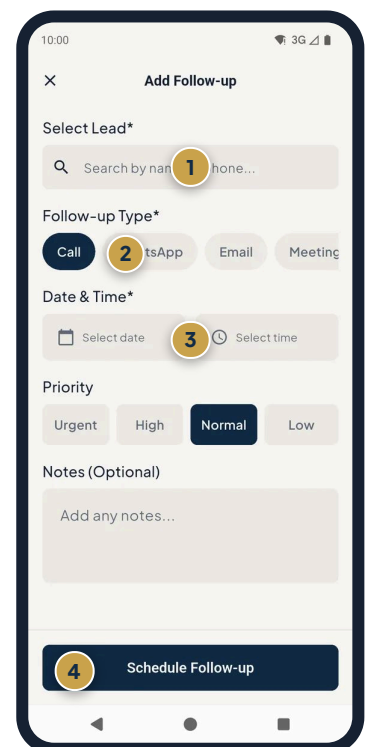
Tap **Edit** ² to change the date, time or notes.



Follow-up details with Complete and Edit

3 Schedule a new follow-up

Tap **+**, search for the lead ¹, pick the type ² (Call, WhatsApp, Email, Meeting), set the date and time ³, then **Schedule Follow-up** ⁴.



Add follow-up form

Site visits

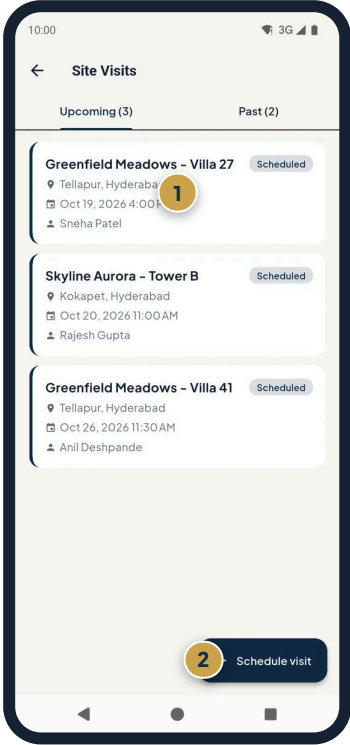
Plan property visits, then record how they went.

1 Upcoming and past visits

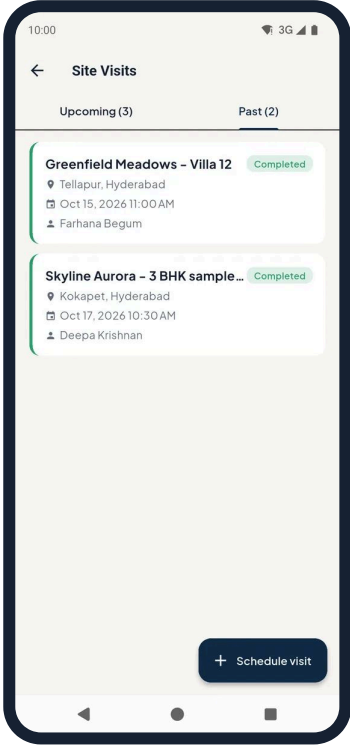
Open **Site Visits** from the home screen. **Upcoming** lists scheduled visits; **Past** shows completed ones.

Tap a visit **1** to see its details.

Schedule visit **2** adds a new one.



Upcoming site visits

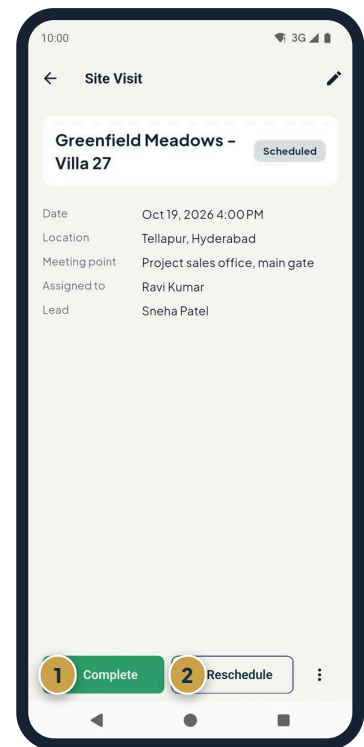


Completed site visits

2 After the visit

Tap **Complete** ¹ and write the client's feedback. The lead moves to **Site Visit Done** automatically.

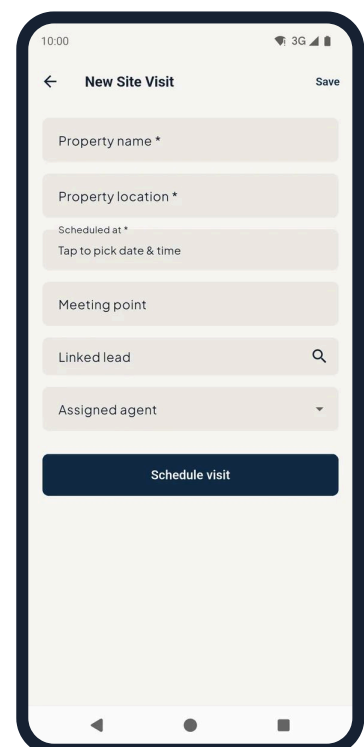
Plans changed? Tap **Reschedule** ².



Site visit details

3 Schedule a visit

Enter the property name and location, pick the date and time, link the lead and choose who will take the client. Tap **Schedule visit**.



New site visit form

Find and work your leads

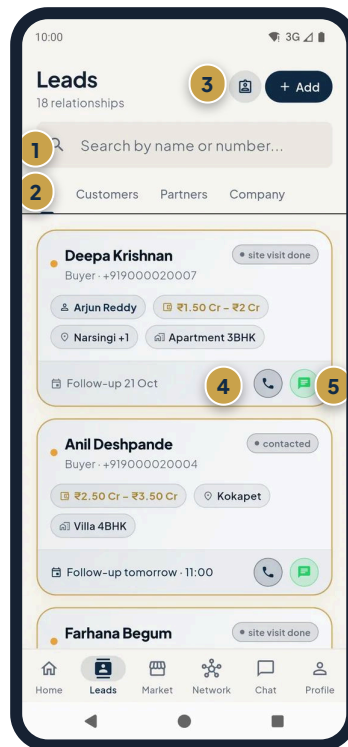
Search, filter, call and WhatsApp your leads.

1 The lead list

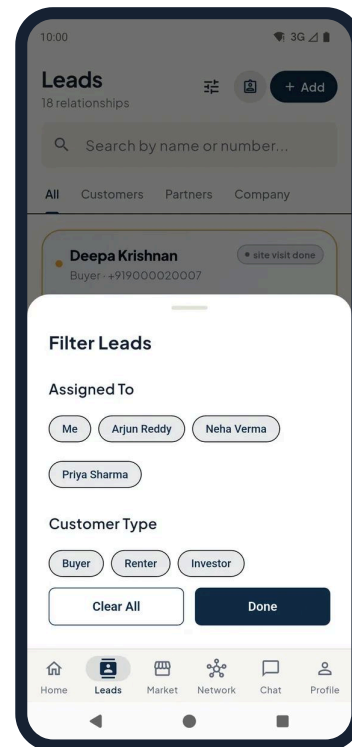
Search by name or number **1**. Use the tabs **2** to show customers, channel partners or companies.

The filter button **3** narrows the list by who it's assigned to, customer type and more.

Each card shows the status, budget, location and next follow-up. Call **4** or WhatsApp **5** straight from the card.



Leads list



Lead filters

Add a lead

Type the details, or pick the number from your contacts or recent calls.

1 Basic information

On Leads tap **+ Add**. Enter the name **1**.

For the number, type it, pick it from your contacts **2**, or from your recent calls **3**.

Choose the lead type **4** - Customer, Channel Partner or Company - and where the lead came from.

10:00 3G

Add Lead

BASIC INFORMATION

Full Name* **1** Enter lead name

Phone Number* **2** **3**

LEAD TYPE* **4** Customer Channel Partner Company

Lead Source

Select Lead Source

CUSTOMER DETAILS

Customer Type*

Select Customer Type*

Save Lead

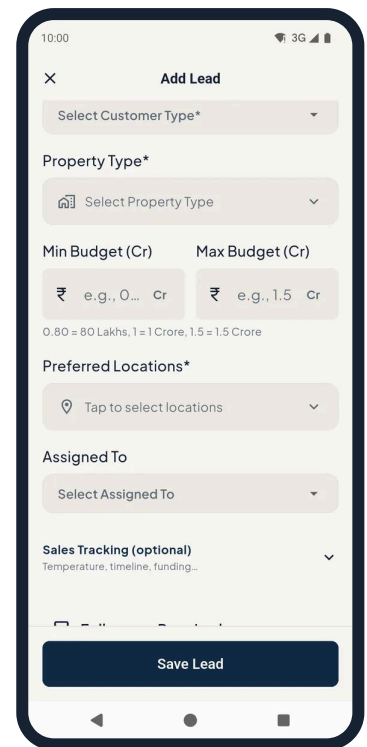
Add lead form

2 Requirement and assignment

Pick the customer type, property type, budget and preferred locations. Budgets are in Crores for buyers (0.80 = 80 Lakhs) and per month for tenants.

Assign the lead to yourself or a teammate, tick **Follow-up Required** to schedule the first call, then **Save Lead**.

Notes can be dictated: tap the microphone in the notes box.

A screenshot of a mobile application's 'Add Lead' form. The form is titled 'Add Lead' with a close button (X) in the top left. It contains several input fields: 'Select Customer Type*' (a dropdown menu), 'Property Type*' (a dropdown menu with a house icon), 'Min Budget (Cr)' and 'Max Budget (Cr)' (two input fields with currency symbols and examples like '₹ e.g., 0... Cr' and '₹ e.g., 1.5 Cr'), 'Preferred Locations*' (a dropdown menu with a location pin icon), 'Assigned To' (a dropdown menu), and 'Sales Tracking (optional)' (a dropdown menu with a subtext 'Temperature, timeline, funding...'). At the bottom, there is a large blue button labeled 'Save Lead'. The status bar at the top shows the time as 10:00 and 3G connectivity.

Add lead requirement fields

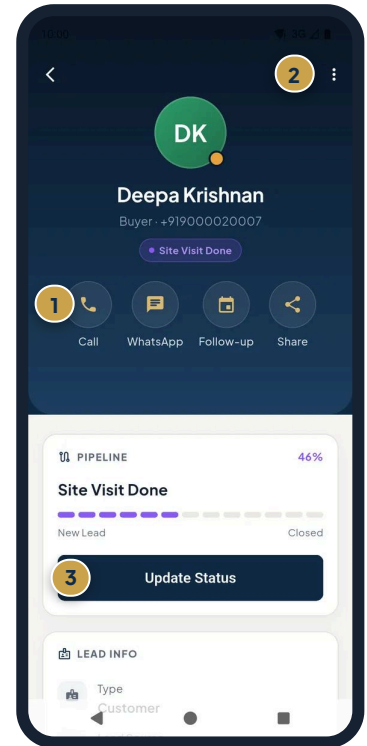
Lead details and status

Everything about a lead in one place, and how to move it through your pipeline.

1 The lead page

At the top: **Call**, **WhatsApp**, **Follow-up** and **Share** 1. The pencil 2 edits the lead.

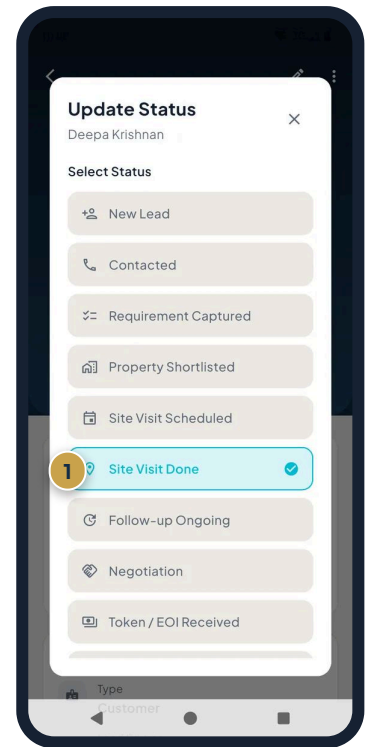
The pipeline bar shows how far the lead has come. Tap **Update Status** 3 to move it.



Lead details

2 Update the status

Choose where the lead is now - from **New Lead** through **Site Visit Done** ¹ and **Negotiation** to **Closed**. The Pipeline board moves with it.

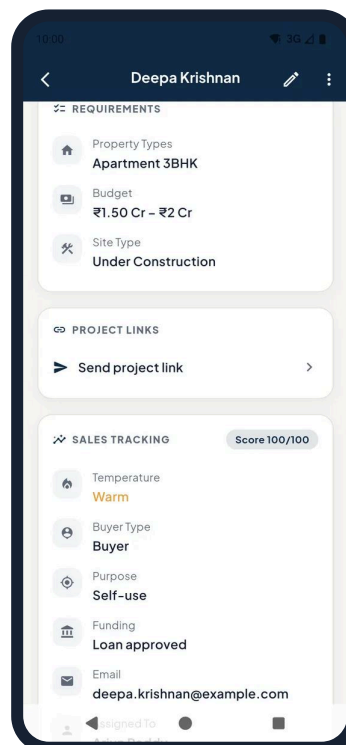


Update status list

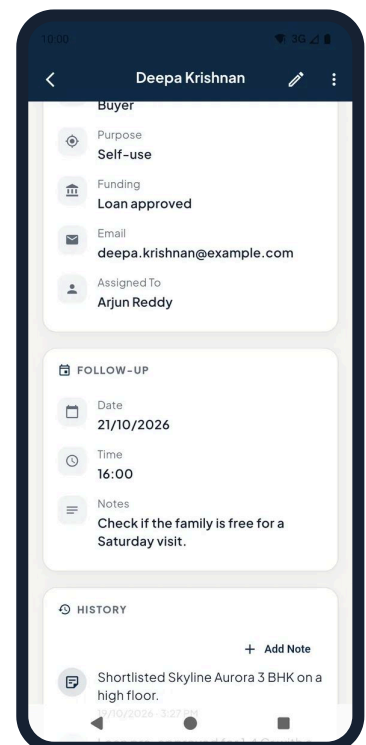
3 Requirements, project links and history

Scroll down for the requirement, **Send project link** (send a project's details to the client), sales tracking, the next follow-up and the full history of calls and notes.

Tap **Add Note** in History to record what was discussed.



Lead requirements and sales tracking



Lead follow-up and history tracking

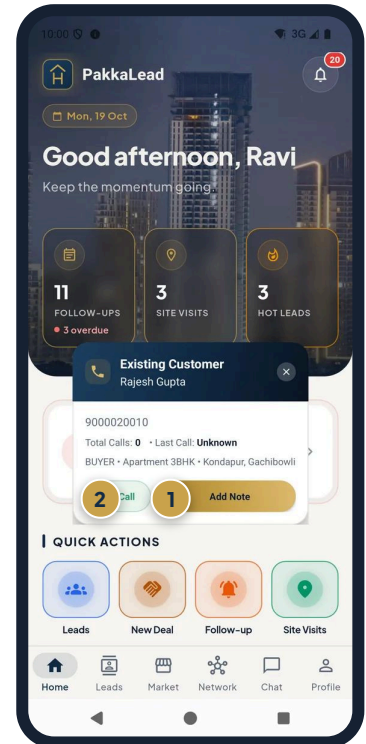
The after-call popup

Save a caller as a lead, or note what a lead said, the moment a call ends.

1 A call with an existing lead

When a call with one of your leads ends, the popup shows their name and requirement.

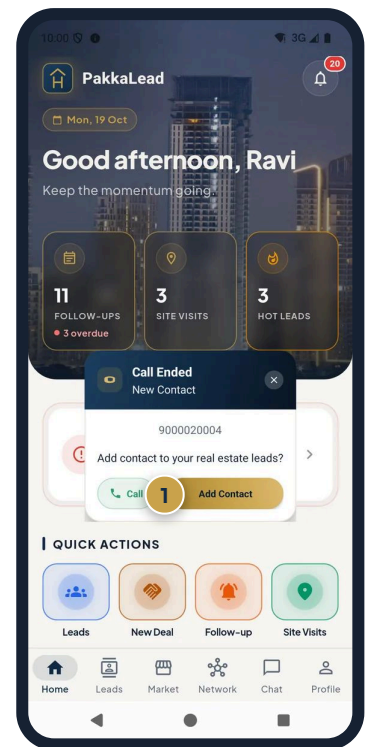
Tap **Add Note** 1 to record the conversation, or **Call** 2 to call back.



After-call popup for an existing lead

2 A call with a new number

Tap **Add Contact** **1** to open the Add Lead form with the number already filled in.



After-call popup for a new number

GOOD TO KNOW

- No popup? See **Turn on the after-call popup** (pakkalead.in/help/call-popup-setup).

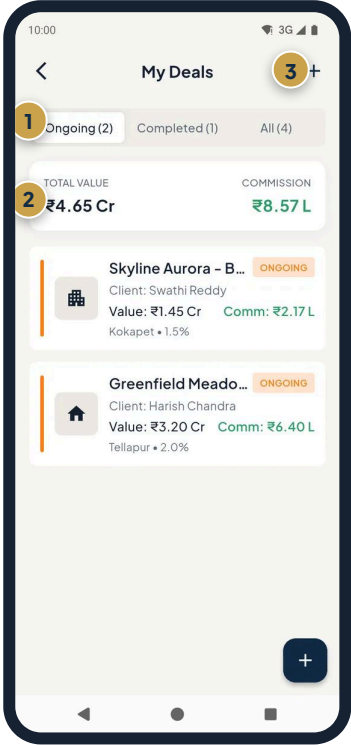
Deals

Track every deal from ongoing to closed, with its value and commission.

1 Your deals

Open Deals from the **Deals** card on the home screen. Switch between **Ongoing**, **Completed** and **All** 1 .

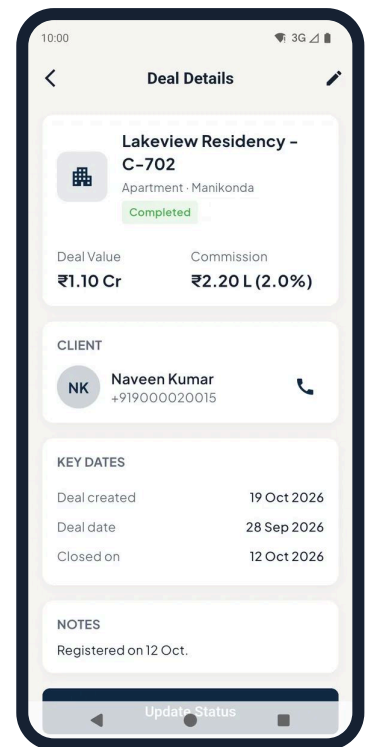
The summary 2 totals the value and commission of the deals listed. Tap + 3 to add a deal.



Deals list

2 A deal

The deal page shows the value, commission and percentage, the client, and key dates. **Update Status** marks it completed or lost - the lead's status follows.



Deal details

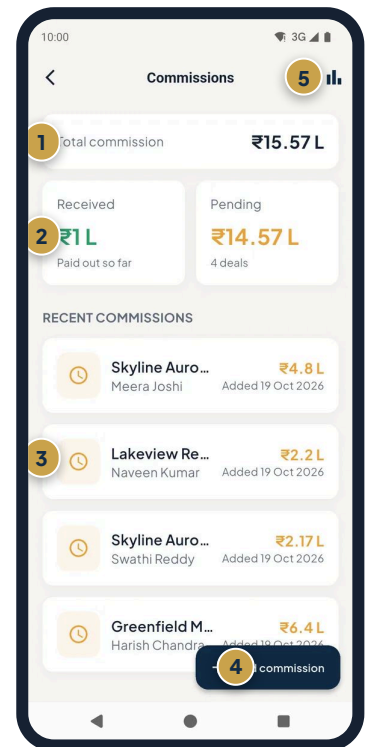
Commissions and payments

See what you've earned and record commission as it is paid.

1 Your commissions

Tap **Expected Commission** on the home screen. You see the total **1**, what has been received and what is pending **2**.

Tap a deal **3** to record a payment. **Add commission** **4** adds a new deal with its commission %. The chart icon **5** opens analytics.



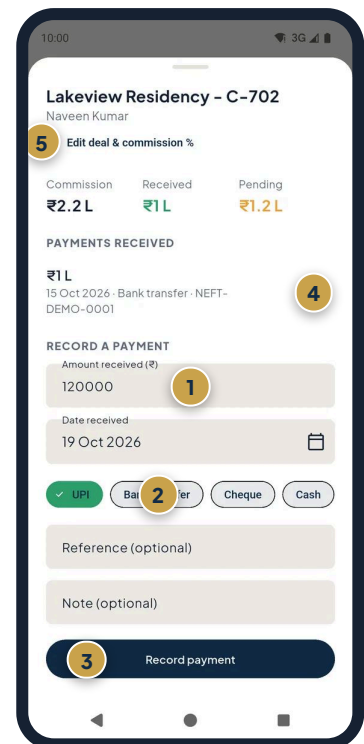
Commissions list

2 Record a payment

Enter the amount received **1** (it starts with what is still pending), the date, and how it was paid **2** - UPI, bank transfer, cheque or cash. Add a reference such as the UTR if you like.

Tap **Record payment** **3**. Entered something wrong? Delete the payment with the bin icon **4**.

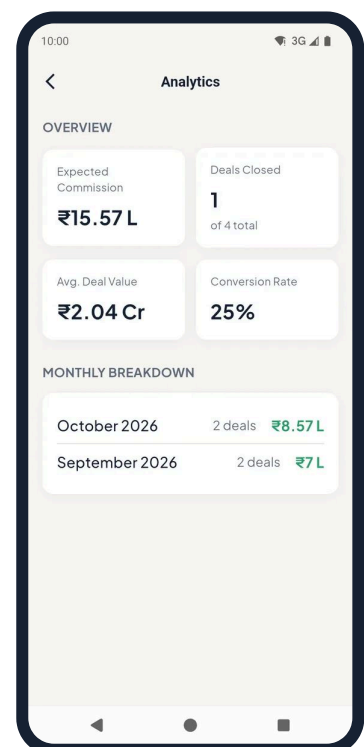
To change the commission amount itself, tap **Edit deal & commission %** **5**.



Record a commission payment

3 Analytics

Expected commission, deals closed, average deal value, conversion rate and a month-by-month breakdown.



Commission analytics

GOOD TO KNOW

- Only the agent who owns a deal can record its payments. Managers see them read-only.

Inventory

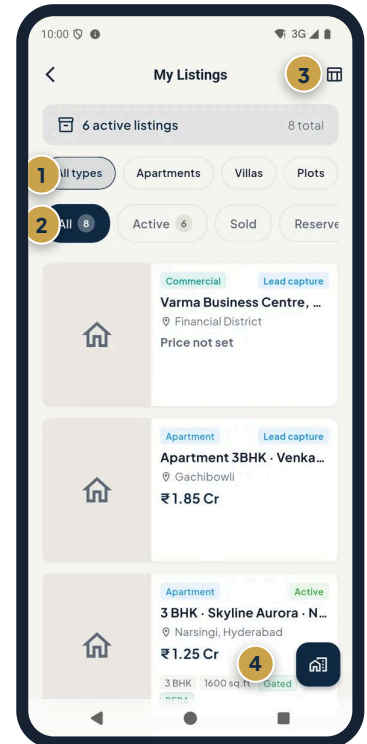
Your own listings – for sale and for rent – in one place.

1 Browse your listings

Open **Inventory** from the home screen. Filter by property type **1** and status **2**. The table icon **3** switches to a spreadsheet view.

Listings marked **Lead capture** come from your seller and landlord leads.

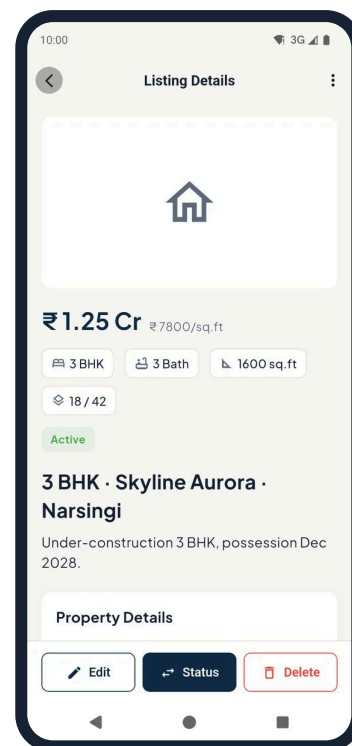
Tap the button **4** to add a listing.



Inventory list

2 A listing

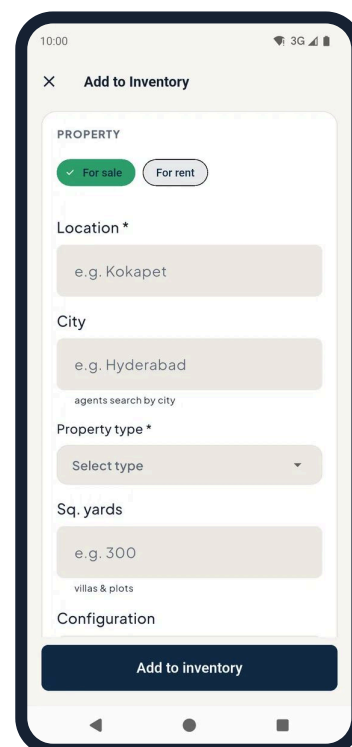
See the price, size, details and commission sharing. **Edit**, change the **Status** (sold, reserved, delisted) or **Delete** at the bottom.



Listing details

3 Add a listing

Choose **For sale** or **For rent**, then the location, property type, configuration, approvals, unit details and price. **Share with other agents** makes it visible in the Market.



Add to inventory form

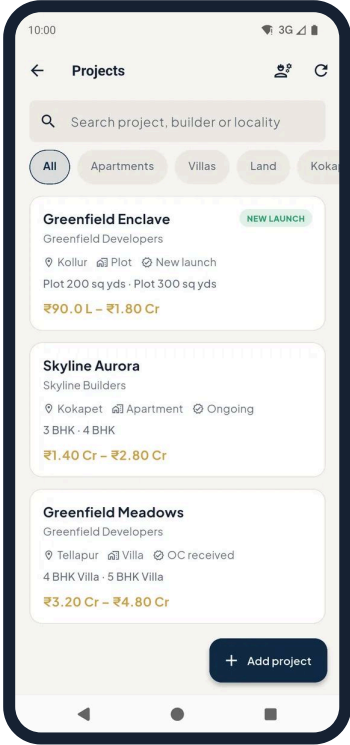
Projects and builders

Builder projects you sell, with configurations, prices and the builder's lead-registration desk.

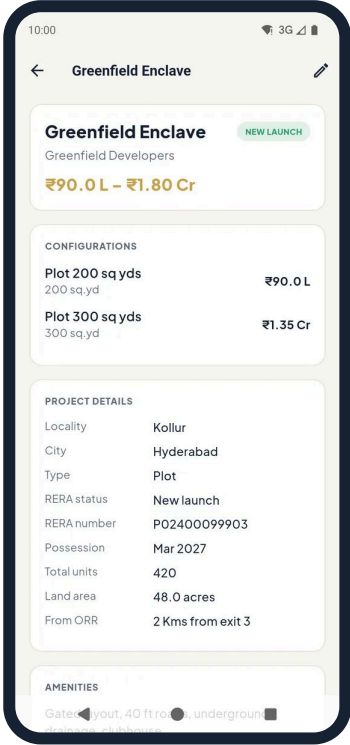
1 Projects

Open **Projects** from the home screen. Search by project, builder or locality, or filter by type.

Tap a project for its configurations and prices, details, amenities, contact and how to register a lead with the builder.



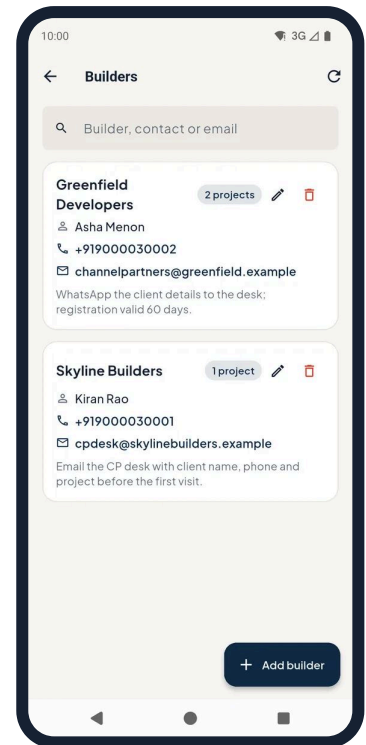
Projects list



Project details

2 Builders

The people icon on Projects opens **Builders**. Each builder keeps its channel-partner desk contact and registration process; its projects use them unless a project overrides them.



Builders list

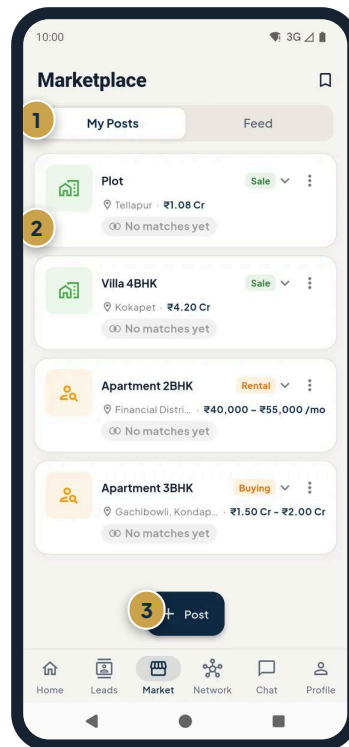
The Market

Post what your clients need or what you have to sell, and find matches with other agents.

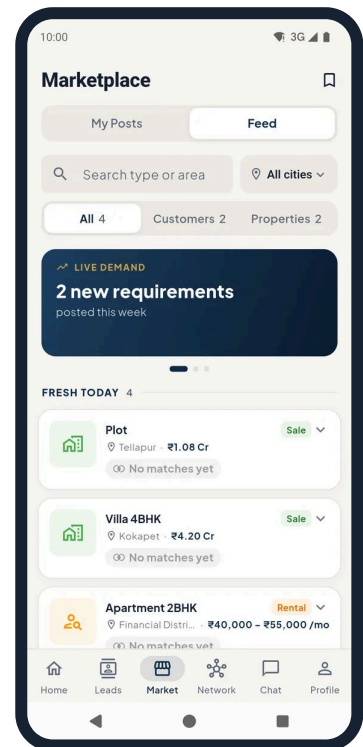
1 My Posts and Feed

My Posts 1 shows your requirements and properties, with how many matches each has 2. **Feed** shows posts from other agents.

Tap **Post** 3 to add one.



Market - my posts

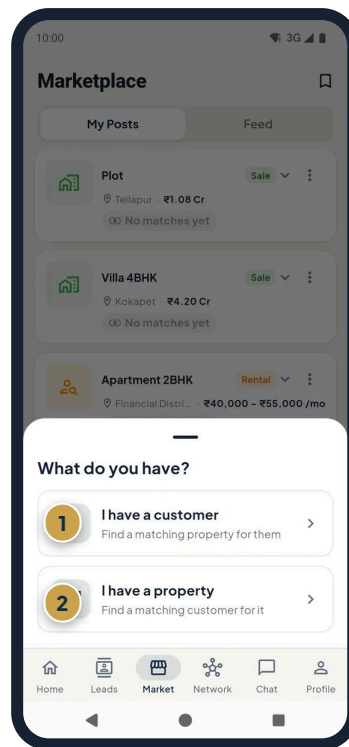


Market feed

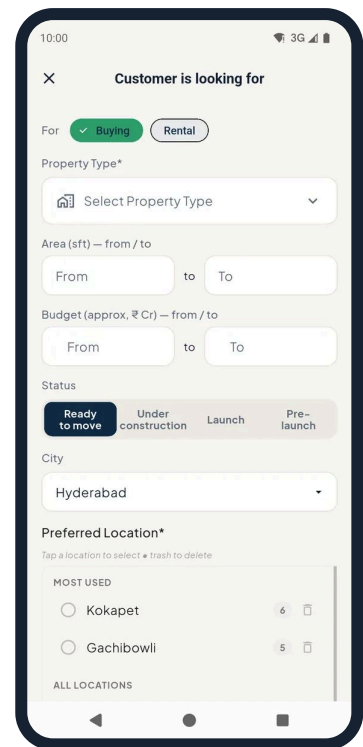
2 Post a customer or a property

Choose **I have a customer** 1 to find properties for them, or **I have a property** 2 to find buyers or tenants.

Fill in what they want (or what you have) and post. Matching posts appear as matches.



What do you have?



Customer requirement form

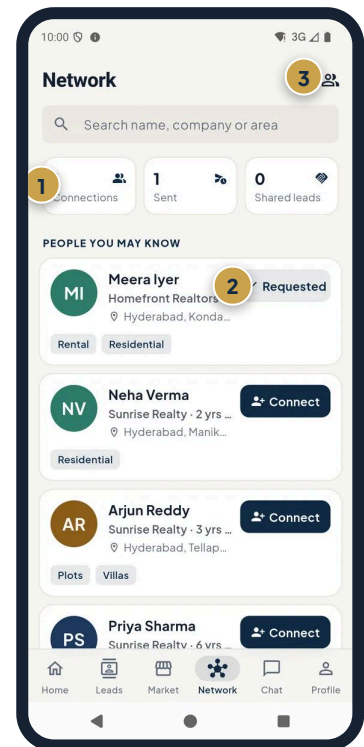
Network and chat

Connect with other agents, share leads and message them.

1 Your network

Network shows your connections, requests you've sent and leads shared with you **1**. **People you may know** suggests agents who work your areas – tap **Connect** to send a request **2**.

The people icon **3** opens **My Network**.

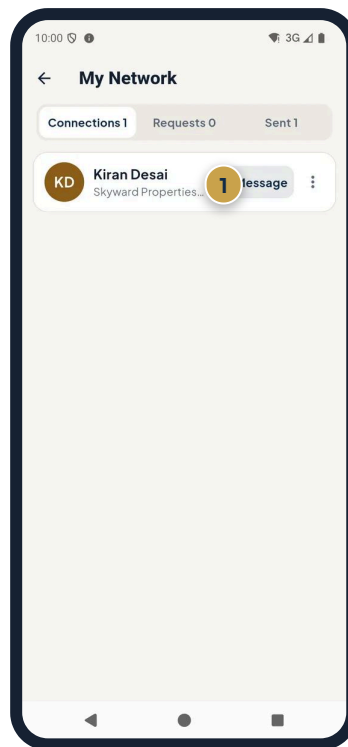


Network

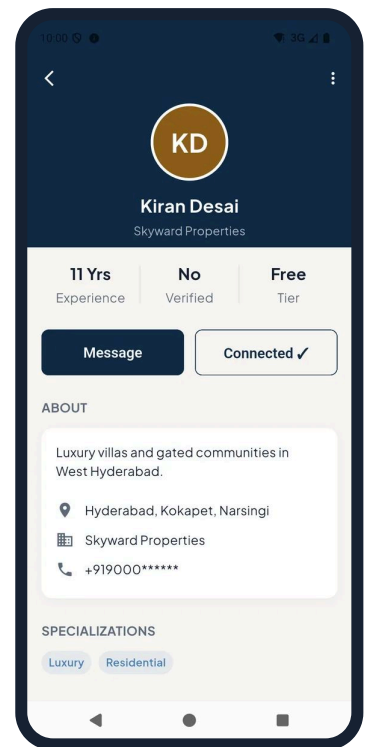
2 Connections and requests

Connections, **Requests** (people asking to connect with you) and **Sent** (your requests waiting for a reply).

Tap **Message** ¹ to chat with a connection, or open their profile.



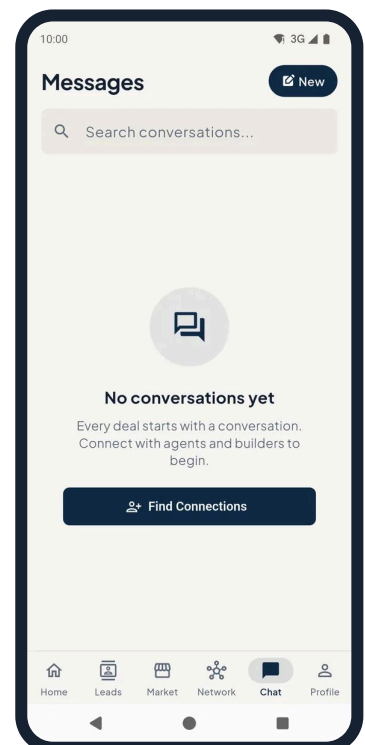
My network



Agent profile

3 Chat

Chat lists your conversations. Tap **New** to message a connection, or **Find Connections** if you have none yet.



Messages

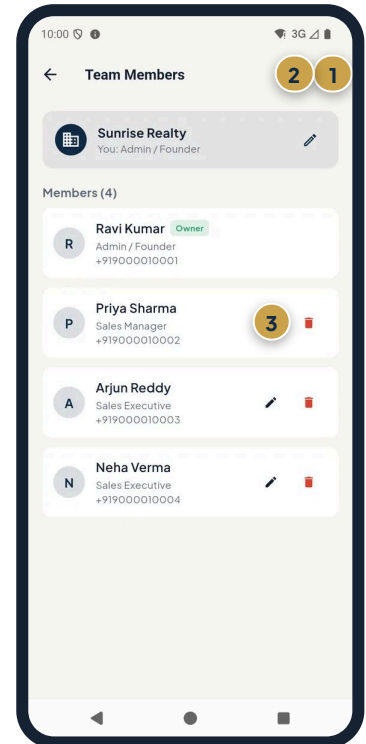
Add team members

ADMINS

Bring your agents into your workspace. Their leads sync to you automatically.

1 Team members

Open **Profile** → **Team Members**. Tap the add icon **1** to add someone, or the QR icon **2** to create an invite code. Use the pencil **3** to change a member's role.

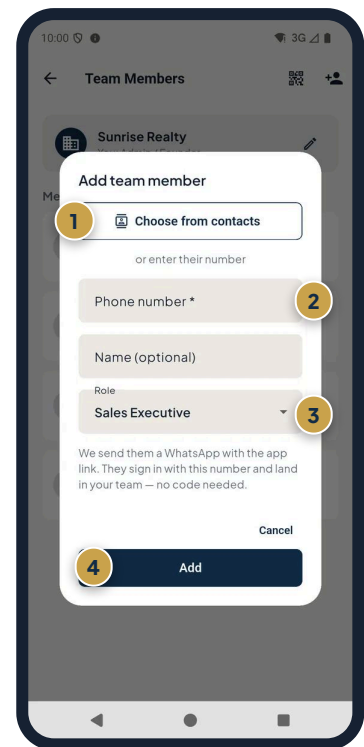


Team members

2 Add a member

Choose them from your contacts **1** or type their number **2**, and pick a role **3**: Sales Executive, Sales Manager or Admin.

Tap **Add** **4**. They get a WhatsApp with the app link. When they sign in with that number they are in your team – no code needed – and their leads and follow-ups appear in yours.



Add team member

GOOD TO KNOW

- Admins see everyone's leads, managers see their team's, and sales executives see their own.

Use PakkaLead on your computer

Open your leads, inventory and projects as editable sheets on a big screen.

1 Connect with a QR code

On your computer, open **pakkalead.in** and choose to sign in. A QR code appears.

On your phone open **Profile → PakkaLead Web** and point the camera at the code. Your computer signs in to your account.



PakkaLead Web scanner

GOOD TO KNOW

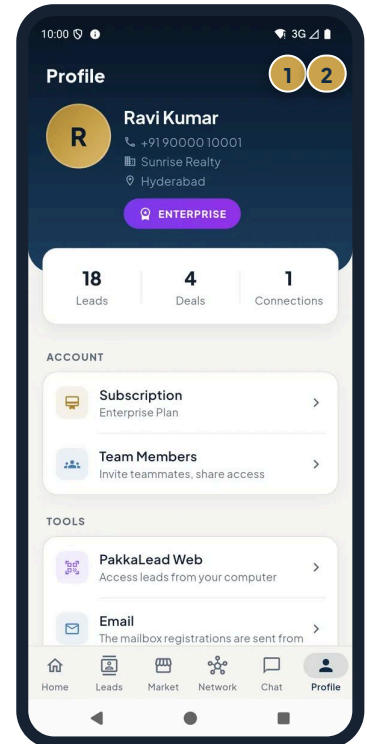
- Then see **the web dashboard** (pakkalead.in/help/web-dashboard) and the other guides under **PakkaLead on your computer**.

Profile, settings and help

Edit your details, change settings, and contact support.

1 Profile

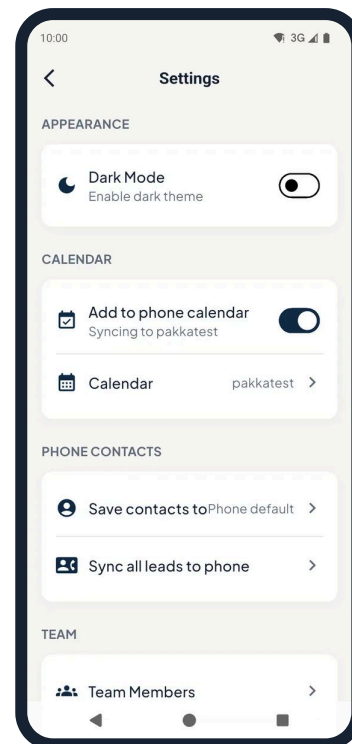
Profile shows your details and plan. The pencil **1** edits your profile; the gear **2** opens Settings.



Profile

2 Settings

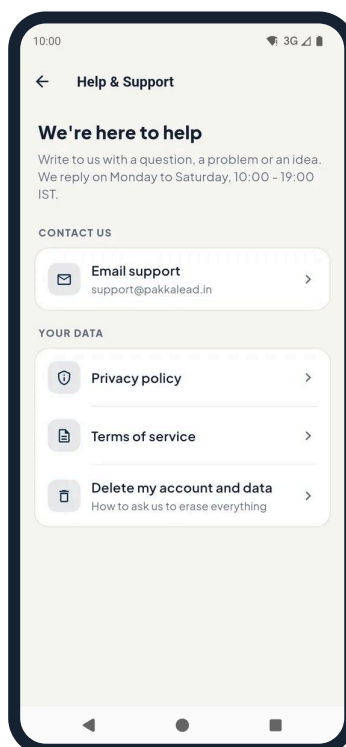
Dark mode, the phone calendar, saving leads to your phone's contacts, team and pipeline settings, and the call popup. **Delete Account** at the bottom removes your account and data.



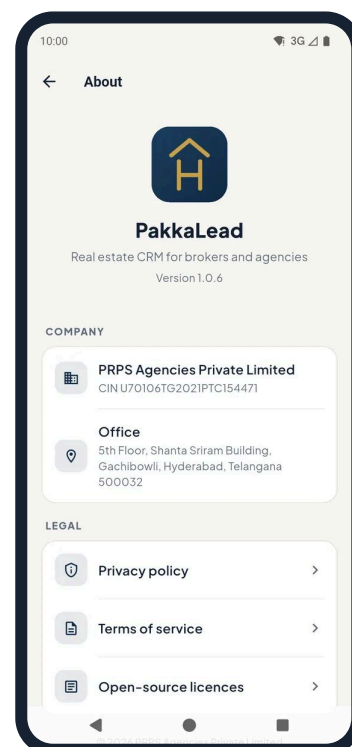
Settings

3 Help and About

Help & Support emails our team and links to the privacy policy, terms and data deletion. **About** shows your app version.



Help and support



About

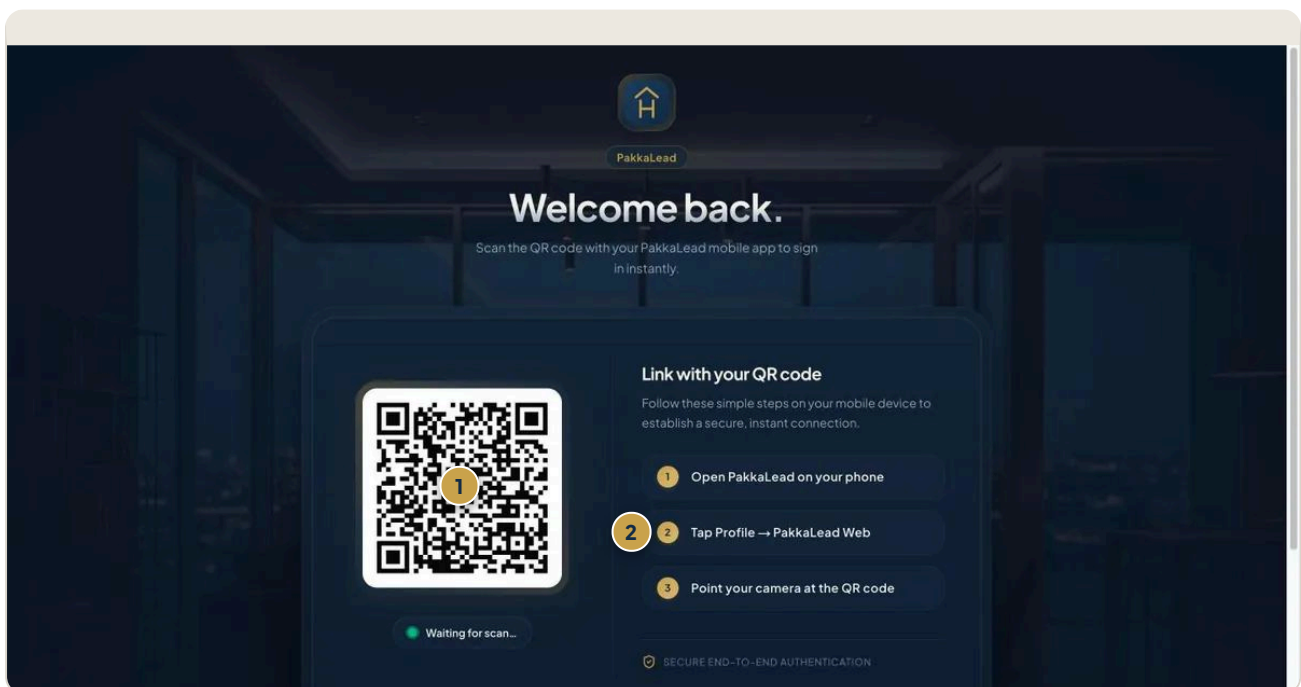
Sign in on the web

Open pakkalead.in on any computer and sign in with your phone – no password.

1 Scan the QR code

On your computer open **pakkalead.in** and click **Sign in**. A QR code appears **1**.

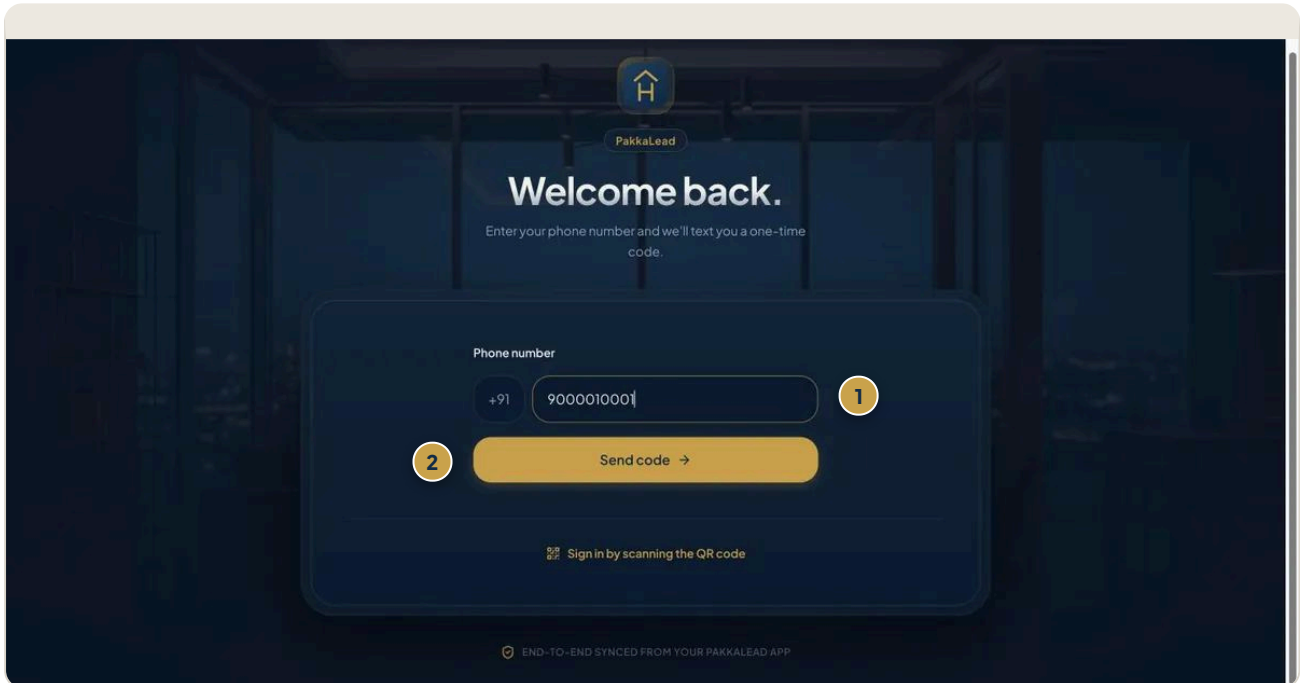
On your phone open PakkaLead, tap **Profile → PakkaLead Web** and point the camera at the code **2**. The computer signs in straight away.



Web sign-in with QR code

2 Or use your phone number

No phone nearby? Click **Sign in with phone number instead**, type your number **1** and click **Send code** **2**. Enter the code that arrives on WhatsApp.



Web sign-in with phone number

GOOD TO KNOW

- Everything you do on the web is the same account as your phone – leads, follow-ups and deals appear in both.

The web dashboard

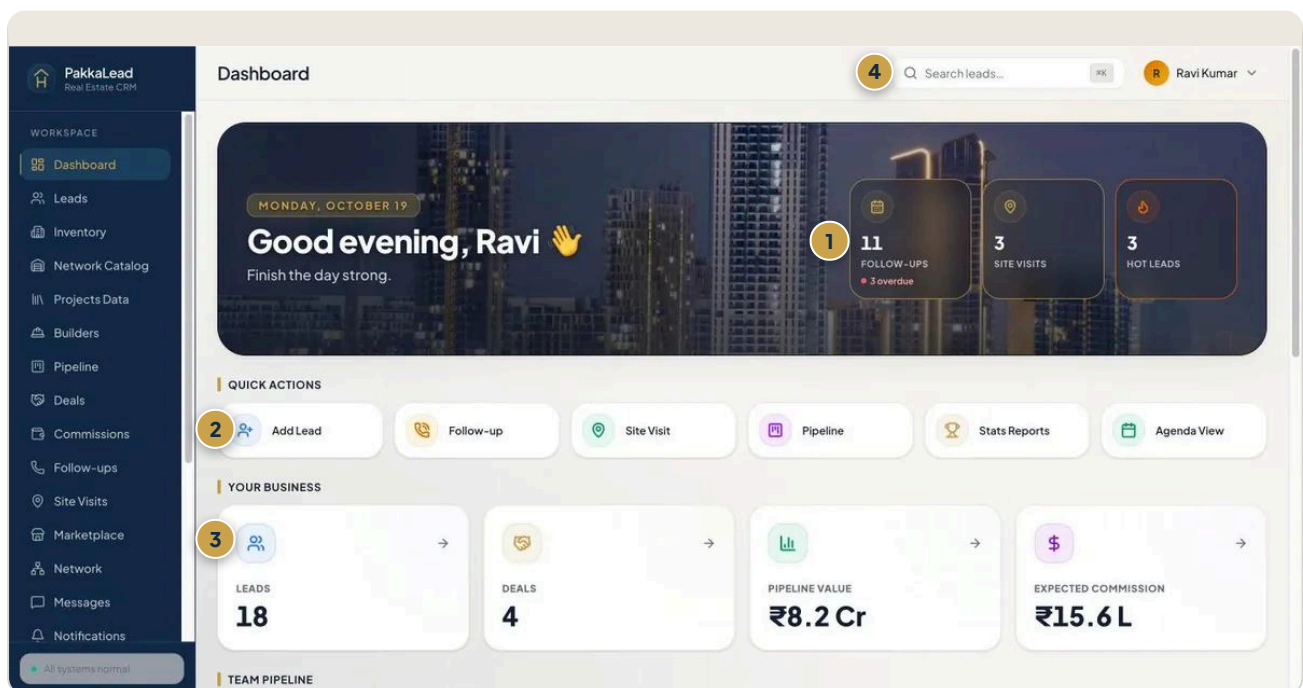
Your day, your numbers and your whole team on one big screen.

1 Today and your business

The cards at the top **1** show follow-ups due, site visits and hot leads. **Quick actions** **2** add a lead, follow-up or site visit in one click.

Your Business **3** shows leads, deals, pipeline value and expected commission. Click a card to open the list behind it.

Use the search box **4** (or press ⌘K / Ctrl+K) to find any lead from any page.

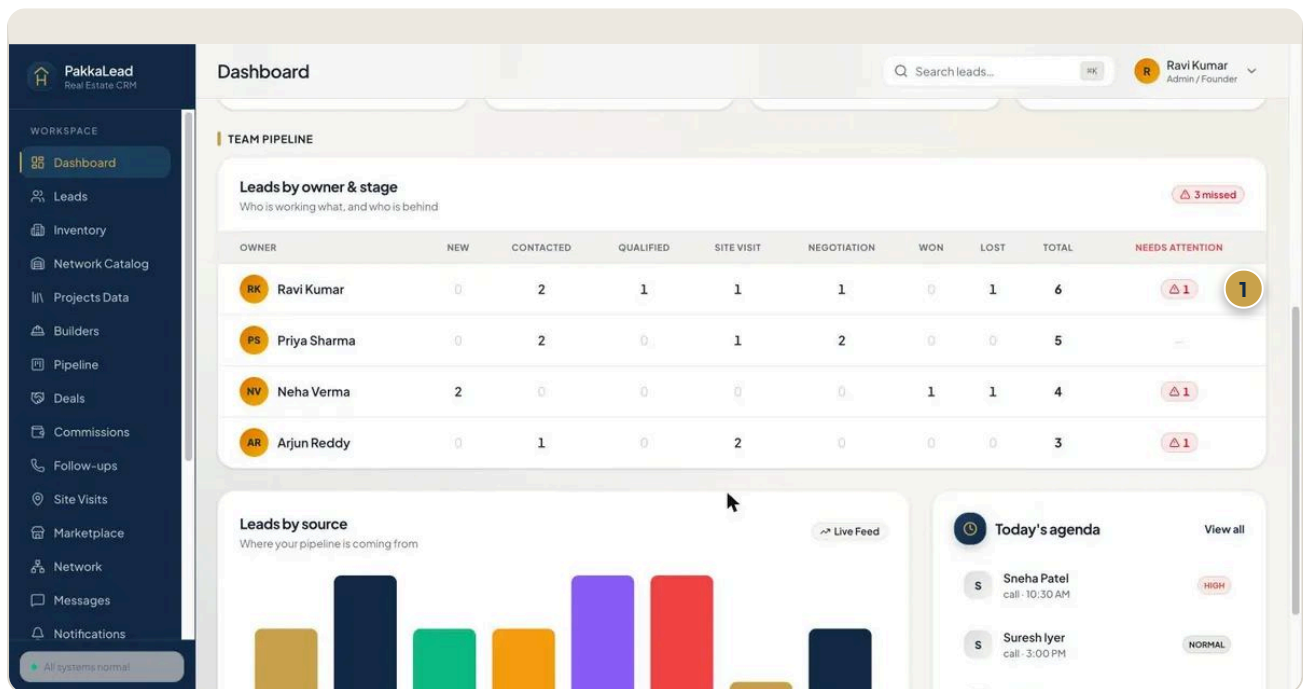


Web dashboard

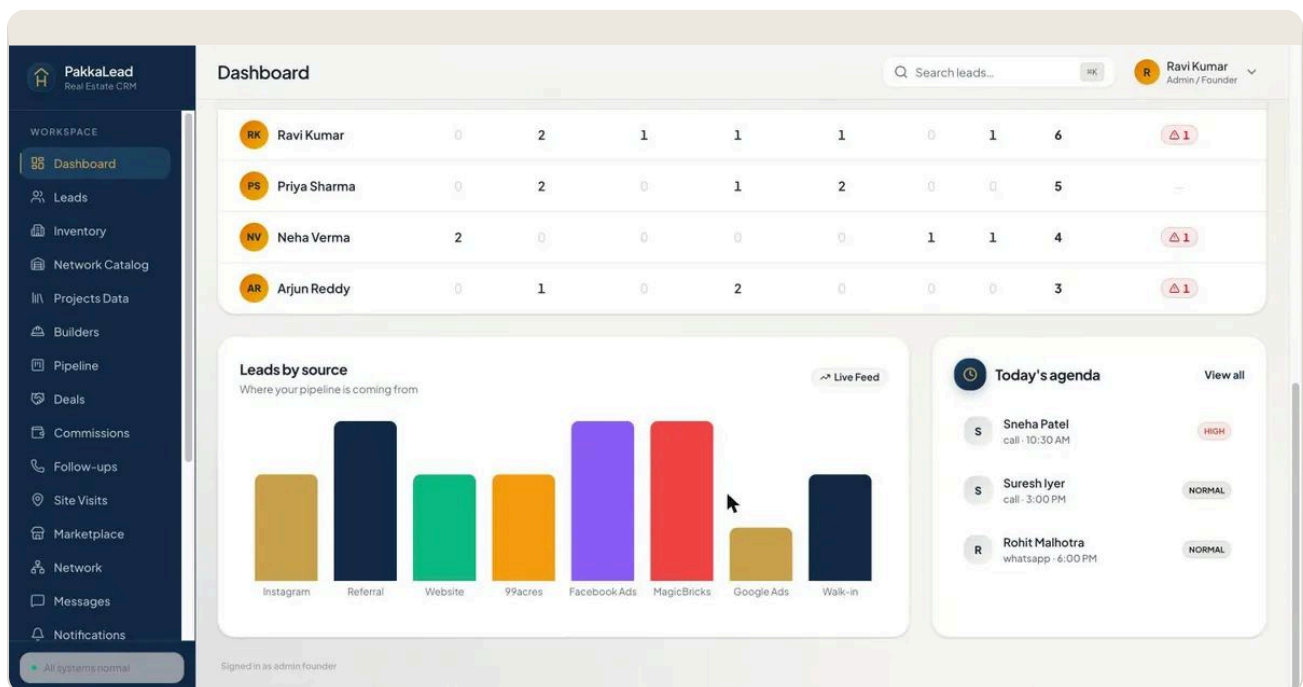
2 Team pipeline and lead sources

Leads by owner & stage shows where each teammate's leads are, with **Needs attention** ¹ flagging missed follow-ups.

Leads by source shows which portals and ads bring you the most leads; **Today's agenda** lists the next calls.



Leads by owner and stage



Leads by source and today's agenda

Leads on the web

Your leads as a spreadsheet you can edit, filter and export.

1 The leads sheet

The counters **1** switch between all leads, customers, channel partners and companies. Filter by assignee, type, status and location **2**.

Columns with a pencil **3** can be edited right in the sheet - double-click a cell. **Open sheet** **4** opens a full-screen sheet; **Export** downloads to Excel.

Add lead **5** opens the new-lead form. Click a name to open the lead.

Leads

Search leads...

Ravi Kumar Admin / Founder

1 18 TOTAL LEADS 18 CUSTOMERS 0 CHANNEL PARTNERS 0 COMPANIES

2 Search leads by name, phone or not All assignees All Types All Status All Locations

3 TYPE

4 Open sheet Assign Export + Add lead

#	NAME	TEAM MEMBER	PHONE	TYPE	CATEGORY	PROPERTY	LOCATION	BUDGET	ACTION
1	Rajesh Gupta	Priya Sharma	+919000020010	Customer	Buyer	Apartment 3BHK	Kondapur, Gachibowli	₹1.60 Cr - ₹2.20 Cr	...
2	Anil Deshpande	Ravi Kumar	+919000020004	Customer	Buyer	Villa 4BHK	Kokapet	₹2.50 Cr - ₹3.50 Cr	...
3	Deepa Krishnan	Arjun Reddy	+919000020007	Customer	Buyer	Apartment 3BHK	Narsingi, Kokapet	₹1.50 Cr - ₹2 Cr	...
4	Farhana Begum	Arjun Reddy	+919000020011	Customer	Buyer	Apartment 3BHK	Tellapur	₹1 Cr - ₹1.30 Cr	...
5	Sneha Patel	Ravi Kumar	+919000020009	Customer	Buyer	Villa 4BHK	Kokapet, Narsingi	₹3 Cr - ₹4 Cr	...
6	Mohammed Faisal	Priya Sharma	+919000020003	Customer	Tenant	Apartment 2BHK	Financial District, Gachibowli	₹35,000 - ₹45,000 /mo	...
7	Gopal Varma	Priya Sharma	+919000020017	Customer	Landlord	Commercial Office	Financial District	₹85 - ₹95 /sft	...
8	Meera Joshi	Ravi Kumar	+919000020016	Customer	Buyer	Apartment 4BHK	Kokapet	₹2.20 Cr - ₹2.60 Cr	...
9	Naveen Kumar	Neha Verma	+919000020015	Customer	Buyer	Apartment 3BHK	Manikonda, Gachibowli	₹1 Cr - ₹1.20 Cr	...
10	Harish Chandra	Ravi Kumar	+919000020013	Customer	Buyer	Villa 4BHK	Kokapet	₹3 Cr - ₹3.50 Cr	...
11	Sunitha Pillai	Neha Verma	+919000020018	Customer	Tenant	Apartment 2BHK	Kondapur	₹28,000 - ₹32,000 /mo	...
12	Swathi Reddy	Priya Sharma	+919000020014	Customer	Buyer	Apartment 3BHK	Narsingi	₹1.30 Cr - ₹1.50 Cr	...
13	Prakash Menon	Ravi Kumar	+919000020012	Customer	Investor	Apartment 4BHK	Financial District, Kokapet	₹2 Cr - ₹2.80 Cr	...

Leads sheet

2 Do everything from the ... menu

Every row has a ... button in the **Action** column ¹. One click gives you:

View lead and **Edit lead** ²; **Add note** and **Schedule follow-up** ³; **Share lead** with a connected agent and **Reassign** it to a teammate ⁴.

Call, **Send message**, **Send project link** (share projects and register with the builder in one step), **WhatsApp** and **Copy number** ⁵ - all without opening the lead.

Mark as Lost ⁶ closes a lead that won't buy.

The screenshot displays the PakkaLead Leads management interface. On the left is a sidebar with navigation options: Dashboard, Leads (selected), Inventory, Network Catalog, Projects Data, Builders, Pipeline, Deals, Commissions, Follow-ups, Site Visits, Marketplace, Network, Messages, and Notifications. The main area shows a 'Leads' table with columns: #, NAME, TEAM MEMBER, PHONE, TYPE, CATEGORY, PROPERTY, LOCATION, BUDGET, and ACTION. The table contains 13 rows of lead data. The 'ACTION' column for the 4th row is expanded, showing a menu of actions: View lead, Edit lead, Add note, Schedule follow-up, Share lead, Reassign, Call, Send message, Send project link, WhatsApp, Copy number, and Mark as Lost. Numbered callouts 1 through 6 point to specific elements: 1 points to the three-dot menu icon in the ACTION column; 2 points to 'View lead'; 3 points to 'Add note'; 4 points to 'Share lead'; 5 points to 'Send project link'; and 6 points to 'Mark as Lost'.

#	NAME	TEAM MEMBER	PHONE	TYPE	CATEGORY	PROPERTY	LOCATION	BUDGET	ACTION
1	Rajesh Gupta	Priya Sharma	+919000020010	Customer	Buyer	Apartment 3BHK	Kondapur, Gachibowli	₹1.60 Cr - ₹2.20 Cr	...
2	Anil Deshpande	Ravi Kumar	+919000020004	Customer	Buyer	Villa 4BHK	Kokapet	₹2.50 Cr - ₹3.50 Cr	...
3	Deepa Krishnan	Arjun Reddy	+919000020007	Customer	Buyer	Apartment 3BHK	Narsingi, Kokapet	₹1.50 Cr - ₹2 Cr	...
4	Farhana Begum	Arjun Reddy	+919000020011	Customer	Buyer	Apartment 3BHK	Tellapur		View lead Edit lead Add note Schedule follow-up Share lead Reassign Call Send message Send project link WhatsApp Copy number Mark as Lost
5	Sneha Patel	Ravi Kumar	+919000020009	Customer	Buyer	Villa 4BHK	Kokapet, Narsingi		
6	Mohammed Faisal	Priya Sharma	+919000020003	Customer	Tenant	Apartment 2BHK	Financial District, Gachibowli		
7	Gopal Varma	Priya Sharma	+919000020017	Customer	Landlord	Commercial Office	Financial District		
8	Meera Joshi	Ravi Kumar	+919000020016	Customer	Buyer	Apartment 4BHK	Kokapet		
9	Naveen Kumar	Neha Verma	+919000020015	Customer	Buyer	Apartment 3BHK	Manikonda, Gachibowli		
10	Harish Chandra	Ravi Kumar	+919000020013	Customer	Buyer	Villa 4BHK	Kokapet		
11	Sunitha Pillai	Neha Verma	+919000020018	Customer	Tenant	Apartment 2BHK	Kondapur		
12	Swathi Reddy	Priya Sharma	+919000020014	Customer	Buyer	Apartment 3BHK	Narsingi		
13	Prakash Menon	Ravi Kumar	+919000020012	Customer	Investor	Apartment 4BHK	Financial District, Kokapet		

Lead actions menu

3 A lead

See the requirement, budget and call history. WhatsApp or call **1** straight from the page, add notes in **History**, and click **Edit** **2** to change anything.

The screenshot displays the PakkaLead Real Estate CRM interface. On the left is a dark blue sidebar with a 'WORKSPACE' menu containing: Dashboard, Leads (highlighted), Inventory, Network Catalog, Projects Data, Builders, Pipeline, Deals, Commissions, Follow-ups, Site Visits, Marketplace, Network, Messages, and Notifications. At the bottom of the sidebar is a status bar that says 'All systems normal'. The main content area has a top header with a search bar 'Search leads...', a user profile for 'Ravi Kumar Admin / Founder', and a 'Back to leads' link. Below this is a lead card for 'Rajesh Gupta', identified as a 'Customer - BUYER' with phone number '+919000020010'. The card includes icons for WhatsApp, a call button, and a '1' in a circle. A 'SITE VISIT SCHEDULED' badge is in the top right of the card. Below the lead card is a 'Profile' section with the following details: BUDGET (₹1.60 Cr - ₹2.20 Cr), LOCATIONS (Kondapur, Gachibowli), PROPERTY TYPES (Apartment 3BHK), URGENCY (—), TOTAL CALLS (1), and LAST CALL (Oct 19, 2026 - 4:11 PM). At the bottom is a 'History' section with a placeholder text 'Add a note (e.g. what was discussed on the last call)'. In the top right of the lead card, there are two callouts: a '2' in a circle next to an 'Edit' button and a 'Delete' button.

Lead details on the web

4 Add a lead

Pick the lead type **1** and source, then fill in the name, phone, customer type, property type, budget and locations. Budgets are in Crores - 0.80 means 80 Lakhs.

PakkaLead
Real Estate CRM

WORKSPACE

- Dashboard
- Leads**
- Inventory
- Network Catalog
- Projects Data
- Builders
- Pipeline
- Deals
- Commissions
- Follow-ups
- Site Visits
- Marketplace
- Network
- Messages
- Notifications

New lead

Search leads... RK Ravi Kumar Admin / Founder

Lead type*
Customer Channel Partner Company

Lead source
—

Basic Information

Full name* Phone number*

Customer Details

Customer type* Urgency level
Select customer type Select urgency

Site request type
—

Property type*
Select property type

Add new type (e.g. Penthouse, Studio) Add

Min budget (Cr) Max budget (Cr)
e.g. 0.80 e.g. 1.5

0.80 = 80 Lakhs, 1 = 1 Crore, 1.5 = 1.5 Crore

Preferred locations*

New lead form on the web

The pipeline board

Every lead as a card in its stage – drag to move it forward.

1 Move leads through your stages

Each column **1** is a stage with its lead count and value. Drag a card **2** to another column to change its status – the lead's profile updates too.

Filter to hot, warm or cold leads **3**, or to one teammate. **New lead** **4** adds a card.

The screenshot displays the PakkaLead Pipeline board. On the left is a dark sidebar with a 'Workspace' menu containing links to Dashboard, Leads, Inventory, Network Catalog, Projects Data, Builders, Pipeline (highlighted), Deals, Commissions, Follow-ups, Site Visits, Marketplace, Network, Messages, and Notifications. The main area is titled 'Pipeline' and features a search bar, filters for 'Hot', 'Warm', and 'Cold' leads, and a 'Needs attention' indicator. The board is organized into four columns: 'New Lead' (2 cards), 'Contacted' (4 cards), 'Requirement Captured' (0 cards), and 'Property Shortlisted' (1 card). Each card shows lead details like name, phone number, and property information. A 'New lead' button is located in the top right corner of the board area.

Stage	Lead Count	Lead Value
New Lead	2	₹28.5 Cr
Contacted	4	₹4.7 Cr
Requirement Captured	0	
Property Shortlisted	1	

Leads in 'New Lead' stage:

- Kavitha Rao (+919000020002) - ₹90 L - ₹1.10 Cr - Manikonda - 3d overdue - NV
- Suresh Iyer (+919000020001) - ₹1.20 Cr - ₹1.60 Cr - Gachibowli - Due today - NV

Leads in 'Contacted' stage:

- Anil Deshpande (+919000020004) - ₹2.50 Cr - ₹3.50 Cr - Kokapet - In Id - RK
- Mohammed Faisal (+919000020003) - ₹35,000 - ₹45,000 /mo - Financial District - PS
- Rohit Malhotra (+919000020006) - ₹1.50,000 - ₹2,00,000 /mo - Financial District - Due today - PS

Lead in 'Property Shortlisted' stage:

- Venkat Subramanian (+919000020008) - ₹9,200/sft - ₹1.85 Cr - Gachibowli - 23 Oct - RK

Pipeline board

Follow-ups and site visits on the web

Clear your calls for the day and plan visits from your desk.

1 Follow-ups

Calls and Messages 1 split phone follow-ups from WhatsApp ones. The chips 2 jump to overdue, today, tomorrow and this week.

Click **Complete** 3 when done. **New follow-up** 4 schedules another.

The screenshot shows the 'Follow-ups' section of the PakkaLead CRM. The sidebar on the left lists various workspace functions. The main area shows 11 pending follow-ups, categorized into 'Overdue' (3), 'Today' (3), 'Tomorrow' (1), and 'This Week' (4). The 'Overdue' section lists three tasks: Kavitha Rao (Call, Oct 16, 11:00 AM), Prakash Menon (Email, Oct 17, 12:30 PM), and Lakshmi Narayanan (Call, Oct 18, 5:00 PM). The 'Today' section lists one task: Sneha Patel (Call, Oct 19, 10:30 AM). Each task entry has a 'Complete' button. A 'New follow-up' button is located in the top right corner.

Follow-ups on the web

2 Site visits

Upcoming and **Past** visits, each linked to its lead. **Schedule visit** ¹ plans a new one.

The screenshot displays the PakkaLead Real Estate CRM interface. On the left is a dark sidebar with a 'WORKSPACE' menu containing items like Dashboard, Leads, Inventory, Network Catalog, Projects Data, Builders, Pipeline, Deals, Commissions, Follow-ups, Site Visits (highlighted), Marketplace, Network, Messages, and Notifications. At the bottom of the sidebar is a status bar that says 'All systems normal'. The main content area has a top header with the PakkaLead logo, a search bar for leads, and a user profile for Ravi Kumar. Below this is the 'Site Visits' section, which shows '2 upcoming · 4 past' visits. There are two tabs: 'Upcoming (2)' and 'Past (4)'. The 'Upcoming (2)' tab is active, showing two scheduled visits. Each visit card includes a location pin icon, the project name, location, date and time, and the lead's name. A 'Schedule visit' button with a '1' badge is in the top right of the section.

Project	Location	Date & Time	Lead
Skyline Aurora - Tower B	Kokapet, Hyderabad	Oct 20, 2026 - 11:00 AM	Rajesh Gupta
Greenfield Meadows - Villa 41	Tellapur, Hyderabad	Oct 26, 2026 - 11:30 AM	Anil Deshpande

Site visits on the web

Inventory, projects and builders on the web

Manage listings and builder projects as sheets, and import them from Excel.

1 Inventory

Import from Excel 1 brings in a whole listing sheet at once; **Add manually** 2 adds one property.

Double-click a cell 3 to edit it. Use the header arrows to sort and filter, and drag a header to reorder columns.

PakkaLead

Real Estate CRM

WORKSPACE

Dashboard

Leads

Inventory

Network Catalog

Projects Data

Builders

Pipeline

Deals

Commissions

Follow-ups

Site Visits

Marketplace

Network

Messages

Notifications

All systems normal

Inventory

Search leads...

Ravi Kumar

Admin / Founder

Every property you hold — captured from calls, imported, or added by hand.

All locations

All types

All configs

Min ₹

Max ₹

All communities

8 properties · 2 from lead capture · 6 added or imported ·

1

 Import from Excel ·

2

 Add manually

3

 editable — double-click a cell · locked · on a header: sort & filter · drag a header to move it · its edge to resize · Reset layout

#	LOCATION	PROPERTY TYPE	SQ. YARDS	CONFIGURATION	COMMUNITY	BLOCK / TOWER	FLOOR	FLAT NO.	ACTION
1	Financial District	Commercial Office			Varna Business Centre, Floor 4				...
2	Gachibowli	Apartment 3BHK							...
3	Narsingi, Hyderabad	Apartment		3 BHK	Skyline Aurora		18		1 ...
4	Kondapur, Hyderabad	Apartment		2 BHK	Maple Court		6		1 ...
5	Financial District, Hyderabad	Commercial		Office	Varna Business Centre		4		2 ...
6	Tellapur, Hyderabad	Plot	240 sqyd	Plot	Greenfield Enclave				...
7	Kokapet, Hyderabad	Villa	300 sqyd	4 BHK	Palm Grove Villas				4 ...
8	Gachibowli, Hyderabad	Apartment		3 BHK	Lakeview Heights	Tower C	12	C-1204	1 ...

Inventory sheet

2 The ... menu on each property

Click ... **1** at the end of a row: **View property** or **Edit property** **2** , **Call owner**, **WhatsApp** or **Copy number** **3** , and **Mark as Sold** or **Delete** **4** .

The screenshot displays the PakkaLead Real Estate CRM interface. On the left is a dark sidebar with a 'WORKSPACE' menu containing links to Dashboard, Leads, Inventory (highlighted), Network Catalog, Projects Data, Builders, Pipeline, Deals, Commissions, Follow-ups, Site Visits, Marketplace, Network, Messages, and Notifications. The main area is titled 'Inventory' and includes a search bar, filters for locations, types, configurations, and price ranges, and buttons for 'Import from Excel' and 'Add manually'. Below these are statistics for 8 properties. A table lists properties with columns for ID, Location, Property Type, SQ. YARDS, Configuration, Community, Block/Tower, Floor, and Flat No. The 'ACTION' column for the third row is open, showing a dropdown menu with options: View property, Edit property, Call owner, WhatsApp, Copy number, Mark as Sold, and Delete. Numbered callouts 1 through 4 point to the menu trigger, the menu itself, the 'Copy number' option, and the 'Delete' option respectively.

#	LOCATION	PROPERTY TYPE	SQ. YARDS	CONFIGURATION	COMMUNITY	BLOCK / TOWER	FLOOR	FLAT NO.	ACTION
1	Financial District	Commercial Office	---	---	Varna Business Centre, Floor 4	---	---	---	...
2	Gachibowli	Apartment 3BHK	---	---	---	---	---	---	...
3	Narsingi, Hyderabad	Apartment	---	3 BHK	Skyline Aurora	---	18	---	1. ...
4	Kondapur, Hyderabad	Apartment	---	2 BHK	Maple Court	---	---	---	2. ...
5	Financial District, Hyderabad	Commercial	---	Office	Varna Business Centre	---	---	---	3. ...
6	Tellapur, Hyderabad	Plot	240 sqyd	Plot	Greenfield Enclave	---	---	---	4. ...
7	Kokapet, Hyderabad	Villa	300 sqyd	4 BHK	Palm Grove Villas	---	---	---	...
8	Gachibowli, Hyderabad	Apartment	---	3 BHK	Lakeview Heights	Tower C	12	---	...

Inventory actions menu

3 Projects and builders

Projects Data lists every builder project with prices, configurations and sizes. Click a project name **1** for its full brief. **Bulk add** **2** imports many at once.

Builders keeps each builder's channel-partner desk - contact, email and how to register a lead.

Projects Data

Private to your team Filter by locality, configuration and size while you're on a call. Localities Bulk add Add project

Project or builder All localities All types All configs Min sft Max sft New

3 projects - click a project name to open the full brief editable - double-click a cell locked - on a header: sort & filter drag a header to move it its edge to resize Reset layout

#	PROJECT NAME	BUILDER	LOCATION	TOTAL PRICE	₹/SFT	BHK	FLAT SIZE (SFT)	ACRES	BLOCK
1	Greenfield Enclave	Greenfield Developers	Kollur	₹90.00 L - ₹1.80 Cr		Plot 200 sq yds, Plot 300 sq yds	200 300	48	
2	Skyline Aurora	Skyline Builders	Kokapet	₹1.40 Cr - ₹2.80 Cr	9,500	3 BHK, 4 BHK	1,850 2,600	9.5	4
3	Greenfield Meadows	Greenfield Developers	Tellapur	₹3.20 Cr - ₹4.80 Cr	8,200	4 BHK Villa, 5 BHK Villa	4,200 5,400	32	21C

Projects sheet

Builders

One desk per builder - every project of theirs registers through it. Add builder

Builder, contact or email

2 builders

BUILDER	CONTACT PERSON	PHONE	EMAIL (TO)	CC	PROJECTS	LEAD REGISTRATION
Greenfield Developers	Asha Menon	+919000030002	channelpartners@gree...	—	2	WhatsApp the client detail
Skyline Builders	Kiran Rao	+919000030001	cpdesk@skylinebuilder...	—	1	Email the CP desk with clie

Builders

4 Open a project and share it

Click a project's name to open its brief - price range, size, blocks, possession, RERA number and every configuration. **Edit** 1 or delete it from the top.

To send projects to a customer, open the customer's lead and choose **Send project link** from the ... menu. Pick the projects, keep **Register with the builder** ticked, and share the link on WhatsApp - see **Register a lead with the builder** (pakkalead.in/help/builder-registration).

The screenshot displays the PakkaLead Real Estate CRM interface. On the left is a dark sidebar with a 'WORKSPACE' menu containing: Dashboard, Leads, Inventory, Network Catalog, Projects Data (highlighted), Builders, Pipeline, Deals, Commissions, Follow-ups, Site Visits, Marketplace, Network, Messages, and Notifications. At the bottom of the sidebar is a status bar that says 'All systems normal'. The main content area is titled 'Projects Data' and features a search bar, a user profile for 'Ravi Kumar Admin / Founder', and an 'Edit' button with a yellow circle containing the number '1'. Below this is a card for the 'Skyline Aurora' project, located in Kokapet, Hyderabad, by Skyline Builders. The price range is ₹1.40 Cr - ₹2.80 Cr, with a rate of ₹9,500/sq.ft. Project details include: Land area of 9.5 acres, 4 blocks, 42 floors (G+42), 820 total units, possession in Dec 2028, a clubhouse of 60,000 sq.ft, and a RERA number of P02400099901. The location is 1.2 Kms from exit 1. Below the project card is a table titled 'Configurations (2)' with columns for Configuration, Size, Units, and Price From.

CONFIGURATION	SIZE	UNITS	PRICE FROM
3 BHK	1,850 sft	480	₹1.75 Cr
4 BHK	2,600 sft	340	₹2.45 Cr

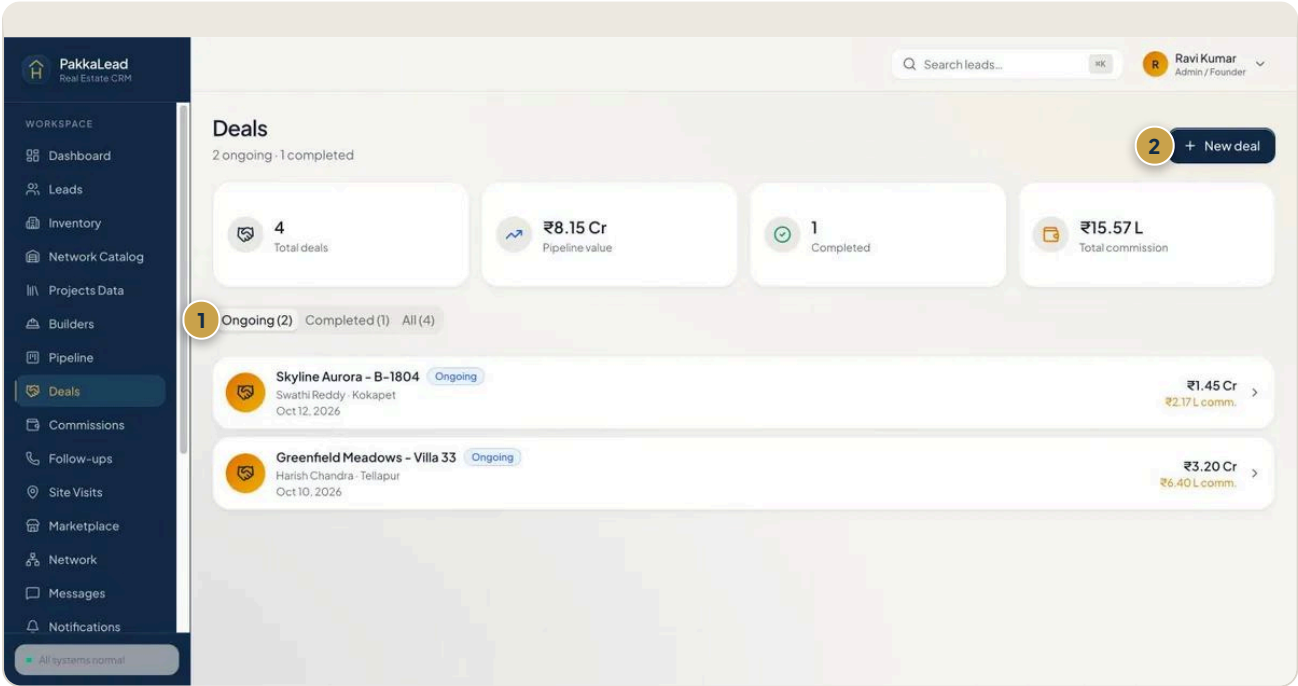
Project brief

Deals and commissions on the web

Track deal value and commission, and see what's still to be paid.

1 Deals

Totals at the top, then **Ongoing**, **Completed** and **All** 1 . **New deal** 2 records a deal with its value and commission %.



Deals on the web

2 Commissions

Total, received and pending commission. Each row shows how much of that deal's commission has come in **1** and what is still due. Filter by status **2**.

PakkaLead
Real Estate CRM

WORKSPACE

- Dashboard
- Leads
- Inventory
- Network Catalog
- Projects Data
- Builders
- Pipeline
- Deals
- Commissions**
- Follow-ups
- Site Visits
- Marketplace
- Network
- Messages
- Notifications

Search leads... RK Ravi Kumar Admin / Founder

Commissions

4 records

2 All statuses

₹15.57 L
Total commission

₹1.00 L
Received

₹14.57 L
Pending

	Skyline Aurora - A-2201 Pending Meera Joshi - 2%	₹4.80 L ₹4.80 L due
	Lakeview Residency - C-702 Partial Naveen Kumar - 2% 1	₹2.20 L ₹1.20 L due
	Skyline Aurora - B-1804 Pending Swathi Reddy - 1.5%	₹2.17 L ₹2.17 L due
	Greenfield Meadows - Villa 33 Pending Harish Chandra - 2%	₹6.40 L ₹6.40 L due

All systems normal

Commissions on the web

Your team on the web

ADMINS

See who reports to whom and add teammates.

1 Team members

Invite by phone 1 adds a teammate – they get a WhatsApp with the app link. **Generate invite code** 2 makes a code instead.

Tree view 3 shows who reports to whom: managers see the leads, calls and deals of everyone under them.

The screenshot displays the 'Team Members' section of the PakkaLead application. On the left is a dark sidebar with a 'Workspace' menu containing items like Dashboard, Leads, Inventory, Network Catalog, Projects Data, Builders, Pipeline, Deals, Commissions, Follow-ups, Site Visits, Marketplace, Network, Messages, and Notifications. The main content area is titled 'Team Members' and shows a 'Sunrise Realty' team with '4 members - unlimited seats'. At the top of this section are two buttons: 'Generate invite code' (labeled with a yellow circle 2) and 'Invite by phone' (labeled with a yellow circle 1). Below these is a toggle for 'Tree view' (labeled with a yellow circle 3) and 'List view'. A search bar 'Search by name, phone or role...' is present. The team members are listed in a tree view: Ravi Kumar (Admin / Founder, +919000010001) is the root. Under him are Priya Sharma (Sales Manager, +919000010002), Arjun Reddy (Sales Executive, +919000010003), and Neha Verma (Sales Executive, +919000010004). A note at the bottom states: 'A member sits under the manager they report to. Managers see the leads, calls and deals of everyone beneath them here — change a line by editing the member's manager.'

Team members on the web

Connect your lead sources

ADMINS

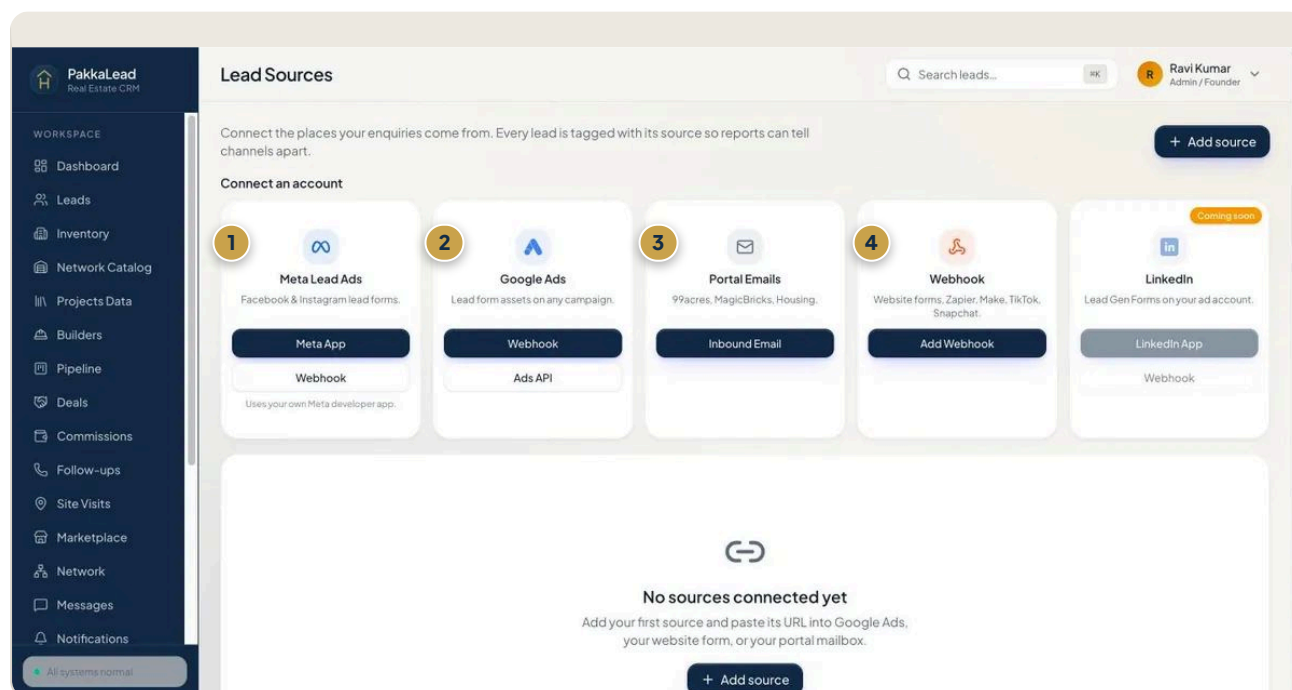
Bring leads in automatically from Facebook, Instagram, Google Ads, portals and your website.

1 Pick a source

Meta Lead Ads 1 - Facebook and Instagram lead forms. **Google Ads** 2 - lead form assets on your campaigns.

Portal Emails 3 - forward 99acres, MagicBricks and Housing enquiry emails. **Webhook** 4 - website forms, Zapier, Make and others.

Every lead arrives tagged with its source, so the dashboard can show which channel works best.



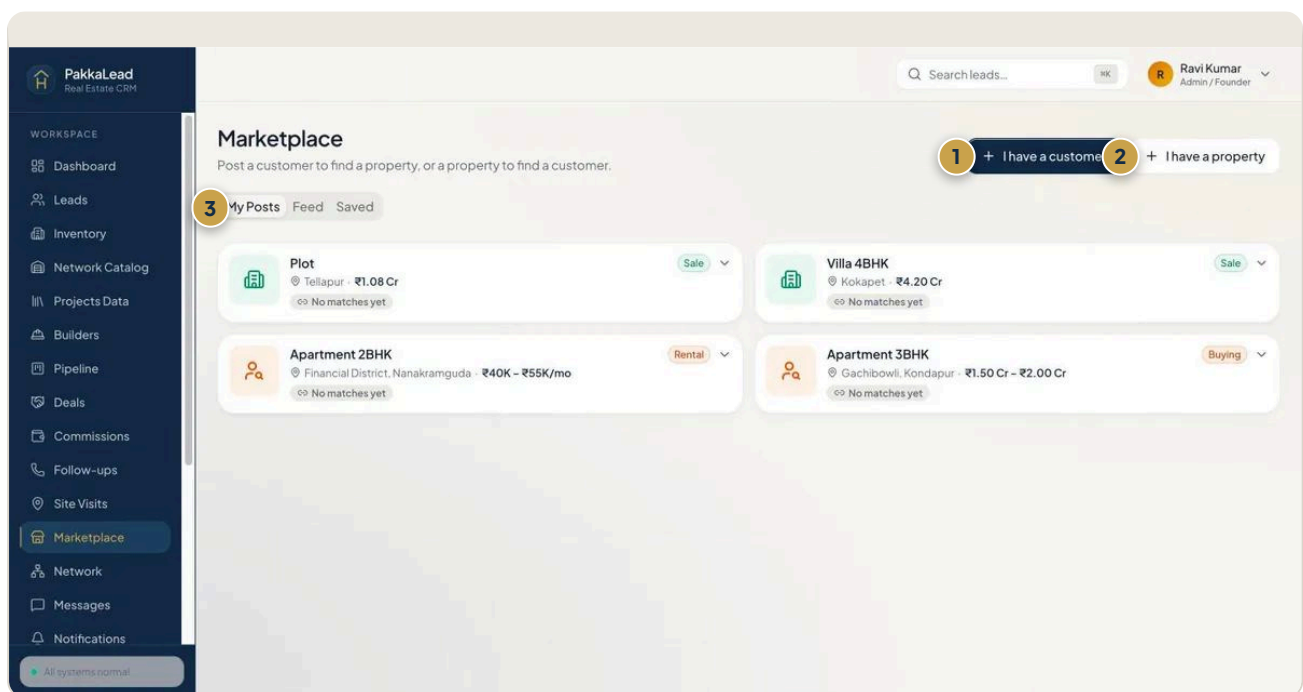
Lead sources

Marketplace and settings on the web

Post customers and properties, and set up your workspace.

1 Marketplace

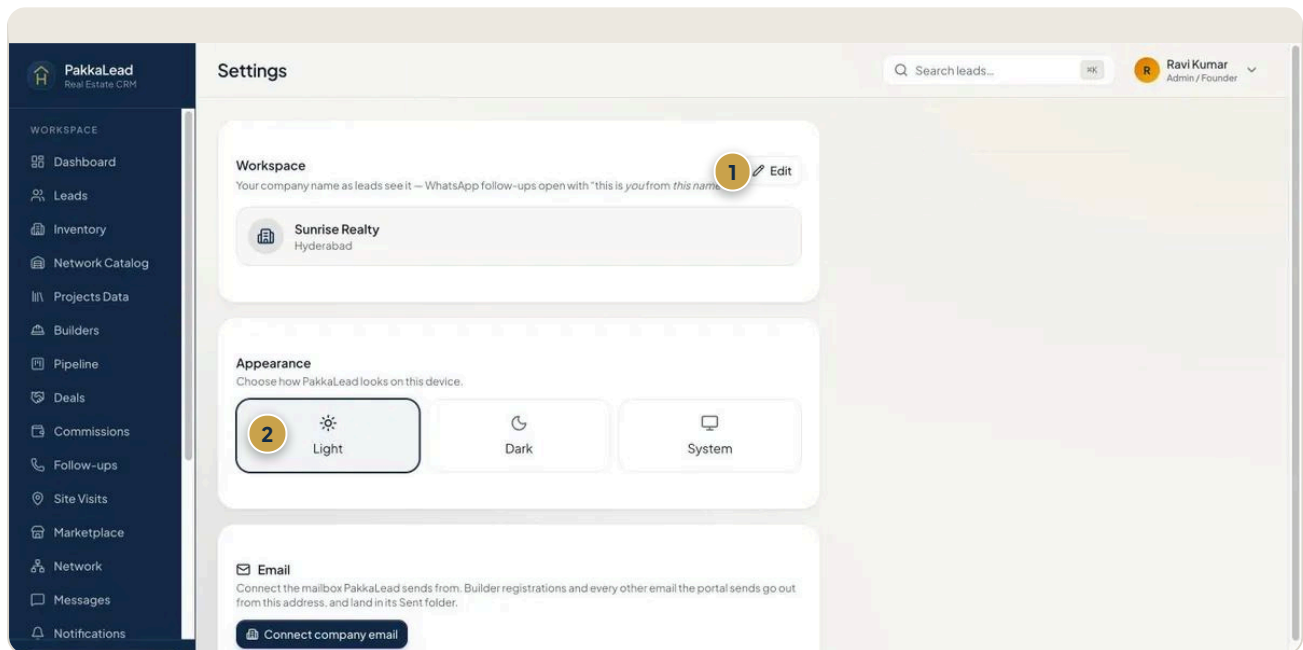
I have a customer 1 finds properties for a client; **I have a property** 2 finds buyers or tenants.
My Posts, Feed and Saved 3 switch the view.



Marketplace on the web

2 Settings

Workspace ¹ is the company name your leads see in WhatsApp messages. **Appearance** ² switches light or dark. **Email** connects the mailbox builder registrations are sent from.



Settings on the web