

NEXTOREx

NEXTOREx CRM

Leads, deals, tasks and appointments.

Version 1.2 · Generated 2026-10-17

Online edition: <https://nextorex.com/help>

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Create a lead

Add a new lead to CRM with their contact details, source, status and priority.

Plan: CRM Basic, Business, Pro and Agency

What this does

A lead is a person or business that may become a customer. Adding leads to CRM keeps every enquiry in one place so none are forgotten.

Steps

1. Open the **CRM** app. In the left menu, open **CRM**, then **Leads**, then **All Leads**.
2. Click **Add Lead**. The **Add Lead** window opens.

Add Lead

LEAD BUILDER
Capture a lead without the usual form fatigue
Fast contact entry, clearer classification and a more polished flow so pending leads feel easier to finish.

SM Sana Malik
Choose source

PRIMARY FOCUS
Brightlane Stores

SOURCE
Choose source

STATUS
Choose status

CONTACT DETAILS

SM

1 FIRST NAME *
Sana

LAST NAME *
Malik

2 EMAIL *
sana.malik@brightlane.example

3 PRIMARY PHONE *
0333-1112223

SECONDARY PHONE

WEBSITE

COMPANY

4 COMPANY NAME
Brightlane Stores

DESIGNATION

ADDRESS

ADDRESS

CITY

STATE

COUNTRY

Cancel **Create Lead**

First name (1), email (2), phone (3) and company (4).

3. Enter the **First name** (1) and **Last name**. Both are required.
4. Enter the **Email** (2) and **Primary phone** (3). Both are required.
5. Add the **Company name** (4), designation and address if you know them.

6. Scroll down to **Classification**.

Add Lead x

COMPANY NAME
Brightlane Stores

DESIGNATION

ADDRESS

ADDRESS CITY

STATE COUNTRY

CLASSIFICATION

Source: Website Status: Open Pipeline: No pipeline Stage: No stage selected

SOURCE * STATUS *

1 Website 2 Open x

PRIORITY SCORE (0-100)

3 High x

PIPELINE PIPELINE STAGE

None None

NOTES

Anything worth remembering about this lead...

Cancel 4 Create Lead

Source (1), status (2), priority (3) and Create Lead (4).

7. Choose the **Source** (1), where the lead came from, for example **Website** or **Referral**.
8. Choose the **Status** (2), for example **Open**. Optionally choose the **Priority** (3) and a **Score** from 0 to 100.
9. Add notes if you want, then click **Create Lead** (4).

What happens next

The lead appears in the **Leads** list. By default the list shows your own leads, with their source, status, score and priority.

Home

CRM

Leads

Leads

Track and qualify incoming leads before they enter your sales pipeline.

Import Leads

Kanban

Trash

Pipeline Settings

Add Lead

DATE

VIEW

All time

My Leads

Click a row to select it, double-click to open the profile, right-click for actions.

Columns

☐

Name, Email, Phone

Source

Status

SCORE

Priority

ASSIGNED

All

☐

Hira Siddiqui

FastFix Mobiles

hira@fastfix.example - 0301-5554443

Walk-in

Follow-up Required

45

low

Ayesha K

☐

Usman Raza

Raza Textiles

usman@raza-textiles.example - 0345-9998887

Referral

In Progress

50

medium

Ayesha K

☐

Sana Malik

Brightlane Stores

sana.malik@brightlane.example - 0333-1112223

Website

Open

55

high

Ayesha K

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Prev

Page 1 of 1

Next

Click a row to select it, double-click to open the profile, right-click for actions.

Important notes

- To add many leads at once, see [Import leads from a CSV file](#).

Related guides

- [The lead profile](#)
- [Import leads from a CSV file](#)

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The lead profile

Open a lead to see its details, add notes and files, assign it to a teammate and follow its history.

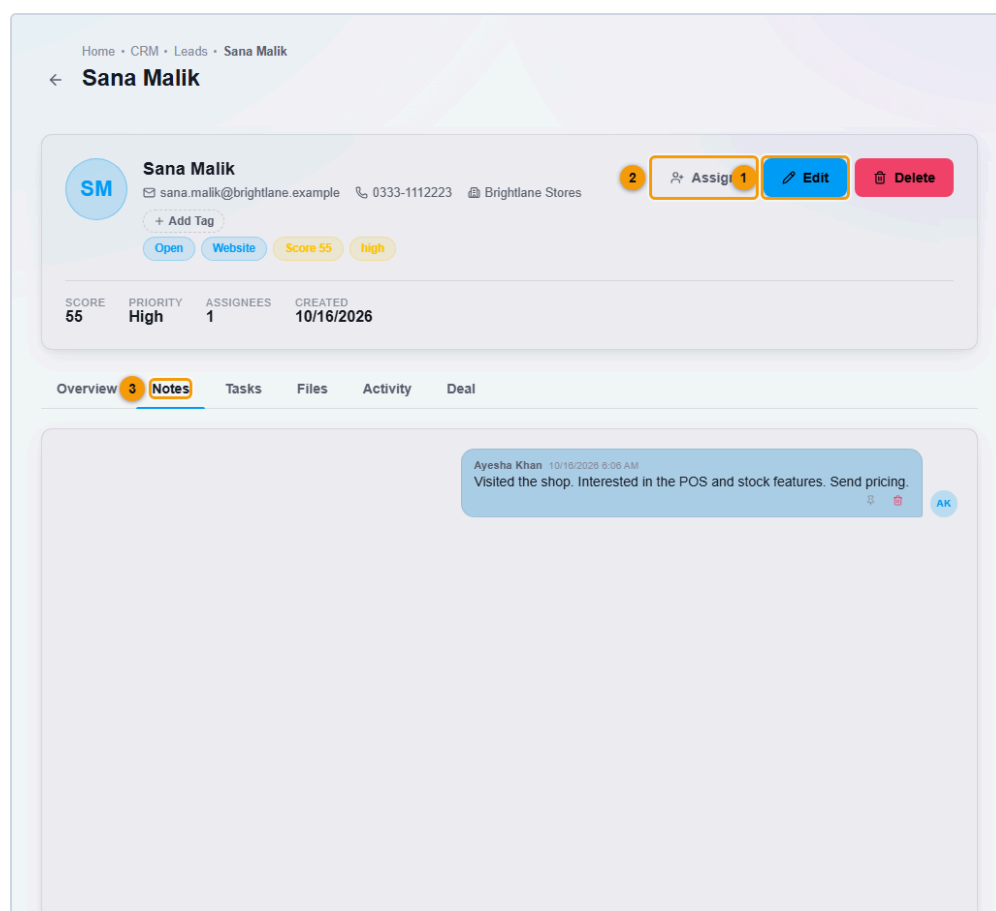
Plan: CRM Basic, Business, Pro and Agency

What this does

The lead profile is the page for one lead. It shows everything about them and keeps your notes, tasks, files and history together.

Steps

1. Open **CRM**, then **Leads**, then **All Leads**.
2. Double-click a lead to open the profile.



Edit (1), Assign (2) and the Notes tab (3).

At the top you can see the name, email, phone, company and tags such as the status, source, score and priority.

- Click **Edit** (1) to change the lead's details.
- Click **Assign** (2) to give the lead to a teammate.
- Click **Add Tag** to label the lead.
- Click **Delete** to remove the lead.

Use the tabs under the header:

- **Overview:** status, stage, pipeline, owner, company, address and assigned users.
- **Notes:** write a note and post it. Your notes show as a conversation, newest at the bottom.
- **Tasks:** things to do for this lead. See [Tasks and follow-ups](#).
- **Files:** drag files onto the page, or click to choose them.
- **Activity:** a history of what happened, starting with *Lead was created*.
- **Deal:** the deals linked to this lead.

What happens next

Everything you add stays on the lead. Teammates who can see the lead see the same notes and tasks.

Related guides

- [Create a lead](#)
- [Tasks and follow-ups](#)
- [Deals](#)

Tasks and follow-ups

Add a task with a due date to a lead so you remember to follow up.

Plan: CRM Basic, Business, Pro and Agency

What this does

A task is a to-do on a lead, such as *Send pricing proposal*, with an optional due date and priority.

Steps

1. Open the [lead profile](#) and click the **Tasks** tab.
2. Click **+ Add Task**. A small form opens.

Home • CRM • Leads • Sana Malik

← Sana Malik

Sana Malik
sana.malik@brightlane.example 0333-1112223 Brightlane Stores

+ Add Tag

Open Website Score 55 high

SCORE 55 PRIORITY High ASSIGNEES 1 CREATED 10/16/2026

Assign Edit Delete

Overview Notes **Tasks** Files Activity Deal

TITLE * DUE DATE

1 Send pricing proposal Oct 16, 2026

PRIORITY

None

Cancel 3 Add

No tasks yet.

Title (1), due date (2) and Add (3).

3. Enter the **Title** (1). It is required.
4. Choose a **Due date** (2) and a **Priority**.
5. Click **Add** (3).

What happens next

The task appears in the lead's **Tasks** tab.

Home • CRM • Leads • Sana Malik

← Sana Malik

SM

Sana Malik

sana.malik@brightlane.example • 0333-1112223 • Brightlane Stores

+ Add Tag

Open Website Score 55 high

Assign

Edit

Delete

SCORE

55

PRIORITY

High

ASSIGNEES

1

CREATED

10/16/2026

Overview

Notes

Tasks

Files

Activity

Deal

+ Add Task

Send pricing proposal

Due Oct 16, 2026

medium

pending

Complete

Cancel

Delete

Tasks stay with the lead.

Important notes

- Add a due date to every task so you know when to follow up.

Related guides

- [The lead profile](#)
- [Deals](#)

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Deals

Track a possible sale with its value, stage and expected close date.

Plan: CRM Basic, Business, Pro and Agency

What this does

A deal is a possible sale. It has an expected value, an owner and a stage in your sales pipeline, such as New Deal, Proposal Sent or Won.

Steps

1. Open **CRM**, then **Deal**, and open the deals list.
2. Click **Add Deal**. The **Add Deal** window opens.

Add Deal

DEAL BUILDER
Create a cleaner deal flow with strong visual hierarchy
Track the customer, pipeline and close signal in one polished modal so the next action is obvious.

REVENUE \$250,000 PROBABILITY Not set CLOSE DATE Not set

DEAL DETAILS

REVENUE \$250,000 PROBABILITY Not set CLOSE DATE Not set

DEAL NAME * 1 Brightlane POS setup 2 EXPECTED REVENUE * 250000

PROBABILITY (0-100) EXPECTED CLOSE DATE
Select date

PRIORITY None OWNER * 3 Ayesha Khan

CUSTOMER

PIPELINE No pipeline STAGE No stage selected PRIORITY None

CUSTOMER NAME * CUSTOMER COMPANY

CUSTOMER EMAIL CUSTOMER PHONE

Cancel 4 Create Deal

Deal name (1), expected revenue (2), owner (3) and Create Deal (4).

3. Enter the **Deal name** (1) and the **Expected revenue** (2).
4. Optionally enter the probability from 0 to 100, the expected close date and the priority.
5. Choose the **Owner** (3), the teammate responsible.
6. Enter the **Customer name** and, if you want, their company, email and phone.
7. Check the **Pipeline** and **Stage**. New deals start at the first stage, *New Deal*.
8. Click **Create Deal** (4).

What happens next

The deal appears in the **Deals** list. You can filter by pipeline, stage, priority and status (**Open**, **Won** or **Lost**). The **Kanban** button shows the deals as cards in columns, one column for each stage.

Home • CRM • Deals

Deals

Track deals as they move through your sales pipeline.

[Kanban](#) [Trash](#) [Pipeline Settings](#) [Dashboard](#) [Analytics](#) [Targets](#) [+ Add Deal](#)

CLOSE DATE

All time

Click a row to select it, double-click to open the profile, right-click for actions.

Columns						
☐	Deal or Customer	Pipeline	Stage	REVENUE	PROB.	HEALTH
☐	Brightlane POS setup Sana Malik	Default Sales Pipeline	New Deal	USD 250,000	0%	55

20 / page

Prev Page 1 of 1 Next

Deals with their revenue, stage and status.

Double-click a deal to open its profile.

Related guides

- [The lead pipeline and Kanban](#)
- [The lead profile](#)

The deal profile and CRM dashboard

Open a deal to see its value, stage and owner, hand it to a teammate, mark it won or lost, and read the CRM revenue dashboard.

Plan: CRM Basic, Business, Pro and Agency

What this does

The deal profile is the full page for one deal. It shows what the deal is worth, where it is in the pipeline and who owns it. You close the deal from here as **won** or **lost**. The CRM dashboard adds up all your deals in one page.

Open a deal

1. Open **CRM**, then **Deal**, then **All Deals**.
2. Double-click the deal.

The screenshot shows the 'Brightlane POS setup' deal profile. At the top, the breadcrumb trail is 'Home > CRM > Deals > Brightlane POS setup'. Below this is a back arrow and the title 'Brightlane POS setup'. The main header area contains a circular logo with 'BP', the deal name 'Brightlane POS setup', and a 'Brightlane Stores' icon. To the right of the logo are five numbered callouts: 1 (Assign), 2 (Mark Won), 3 (Mark Lost), 4 (Edit), and 5 (Delete). Below the logo are buttons for 'New Deal', 'open', 'Health 55', and 'medium'. The main content area displays key metrics: '\$ EXPECTED REVENUE USD 250,000', '% PROBABILITY 0%', 'EXPECTED CLOSE', and 'STAGE New Deal'. Below this is a tabbed interface with 'Overview' selected (callout 5). The 'Overview' tab shows a table with columns: PIPELINE (Default Sales Pipeline), STAGE (New Deal), OWNER (Ayesha Khan), SOURCE, ACTUAL REVENUE (USD 0), WEIGHTED REVENUE (USD 0), DAYS TILL CLOSE, DAYS IN STAGE (0), and CREATED (10/16/2026 7:00 PM). The 'CREATED BY' field shows 'Ayesha Khan'.

Assign (1), Mark Won (2), Mark Lost (3), Edit (4) and the tabs (5).

The top of the page shows the deal name, the customer's company, the stage, the status (**open**, **won** or **lost**), a **Health** score and the priority. Below that you see the **Expected revenue**, the **Probability**, the **Expected close** date and the **Stage**.

The **Overview** tab adds the pipeline, the owner, the source, the **Actual revenue**, the **Weighted revenue**, the days until the close date and the days the deal has been in its stage. Weighted revenue is the expected revenue multiplied by the probability.

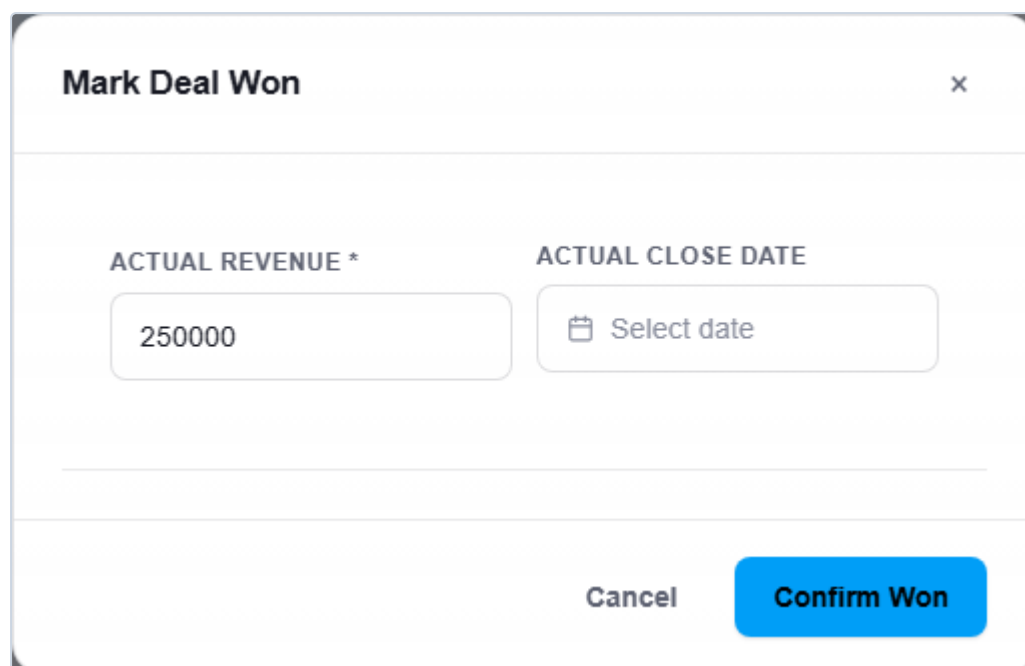
The other tabs are **Notes**, **Tasks**, **Files**, **Activity**, **Assignment**, **Appointment** and **Timeline**.

Change the deal

- **Edit** (4) opens the deal so you can change its details.
- **Assign** (1) gives the deal to another teammate.

Close the deal as won

1. Click **Mark Won** (2).
2. Enter the **Actual revenue** you earned. Add the **Actual close date** if it was not today.
3. Click **Confirm Won**.

A modal dialog box titled "Mark Deal Won" with a close button (X) in the top right corner. The dialog contains two input fields. The first field is labeled "ACTUAL REVENUE *" and contains the value "250000". The second field is labeled "ACTUAL CLOSE DATE" and contains a calendar icon followed by the text "Select date". At the bottom of the dialog, there are two buttons: "Cancel" and "Confirm Won".

ACTUAL REVENUE *	ACTUAL CLOSE DATE
250000	Select date

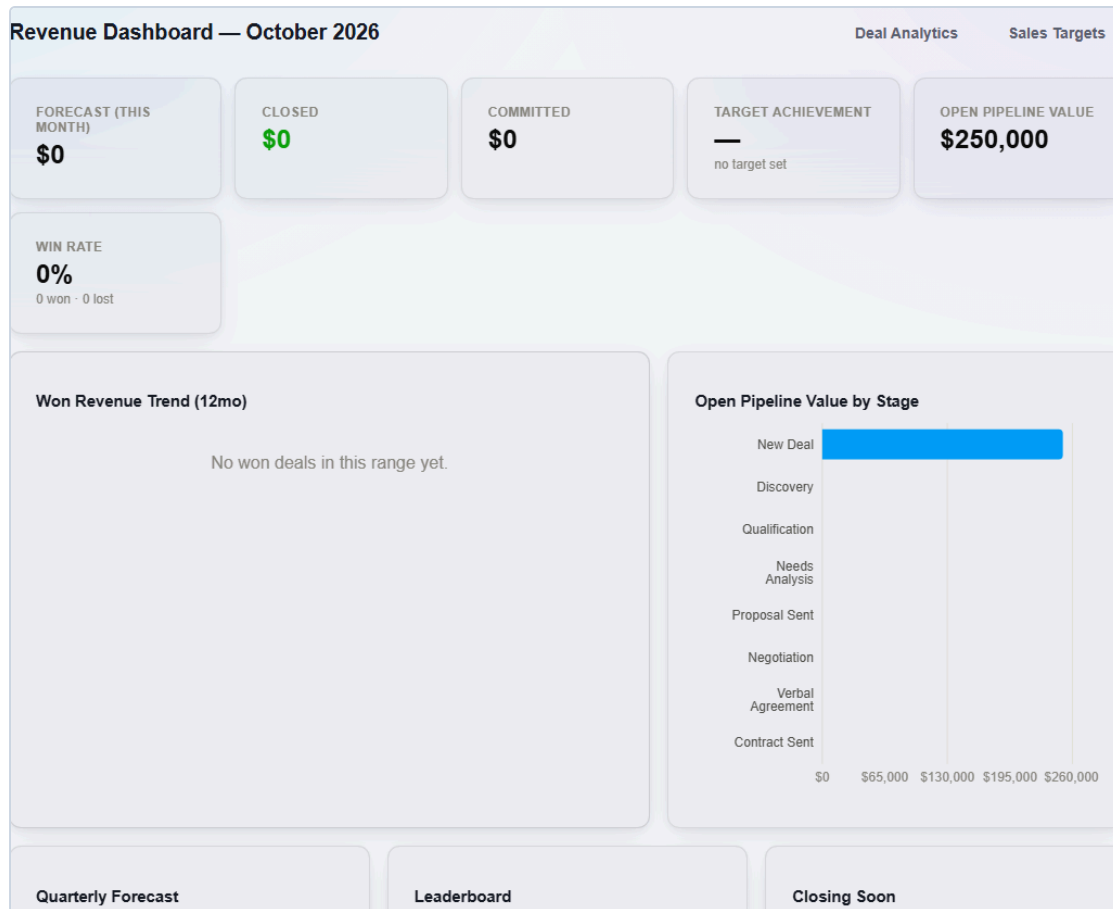
Cancel Confirm Won

Enter the actual revenue and confirm.

Click **Mark Lost** (3) if the deal did not happen.

The CRM dashboard

Open **CRM**, then **CRM Dashboard** to see this month's **Revenue Dashboard**. It shows the forecast for the month, the revenue closed and committed, how close you are to your target, the value of your open pipeline and your win rate. Charts show won revenue over the last 12 months and the open pipeline value in each stage. A leaderboard ranks your sellers, and **Closing Soon** lists deals close to their close date.



The numbers are built from your deals. A new account shows zeros until deals are won.

Important notes

- The dashboard only counts the deals you have in NEXTOREx. It shows **no target set** until a sales target is set for you.
- Mark a deal won only when the sale is agreed.

Related guides

- [Deals](#)
- [Appointments](#)
- [Tasks and follow-ups](#)

The lead pipeline and Kanban

See your leads as cards in columns and review the stages of your pipeline.

Plan: CRM Basic, Business, Pro and Agency

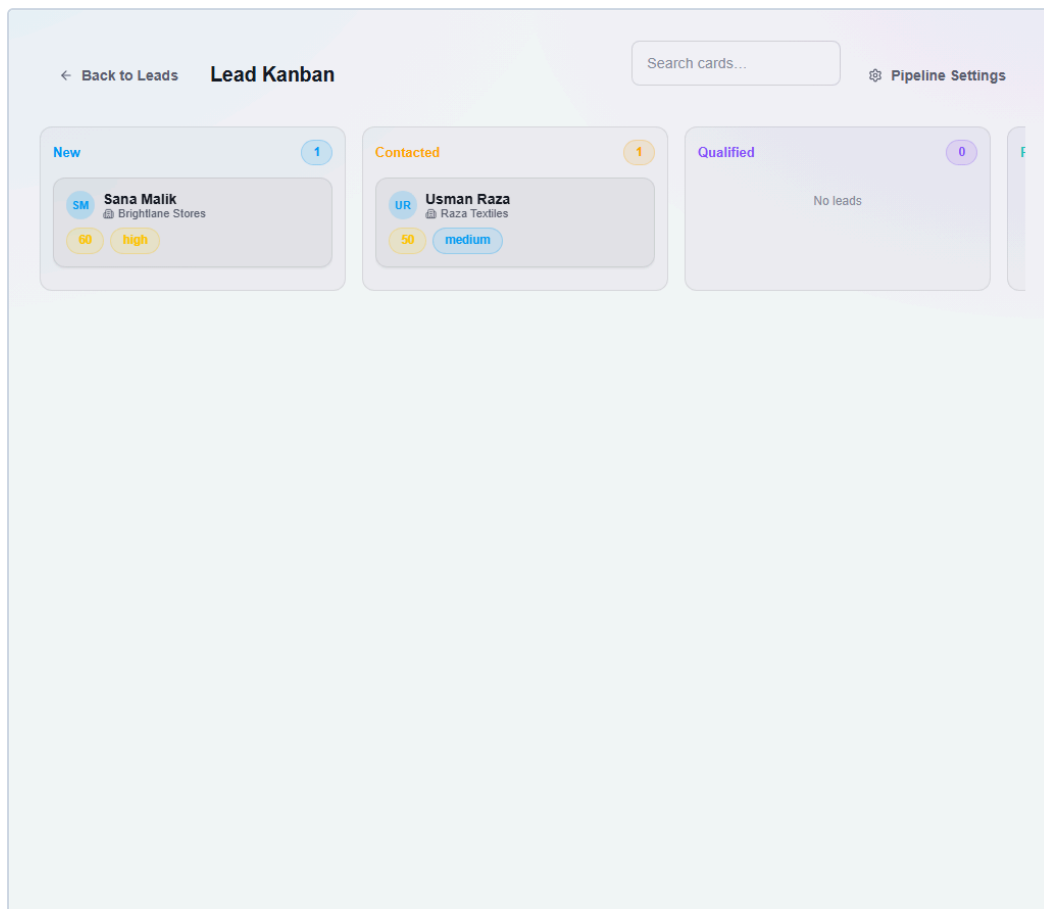
What this does

A pipeline is the list of stages a lead moves through. The Kanban board shows your leads as cards, grouped by stage.

Steps

To see the Kanban board:

1. Open **CRM**, then **Leads**, then **All Leads**.
2. Click **Kanban** at the top right.



Leads grouped by stage.

Click **Back to Leads** to return to the list.

To see or change the stages:

1. Open **CRM**, then **Leads**, then **Pipeline Setup**, or click **Pipeline Settings** on the Leads page.
2. You will see your pipelines, such as **Default Lead Pipeline**, with the number of stages. The buttons let you add, edit, clone or delete a pipeline.

Important notes

- A new lead only appears on the Kanban board if it has a pipeline and a stage. You can choose them when you create or edit a lead.

Related guides

- [Create a lead](#)
- [Deals](#)

Appointments

Book a meeting with a client, pick an open time slot, confirm it and record the outcome.

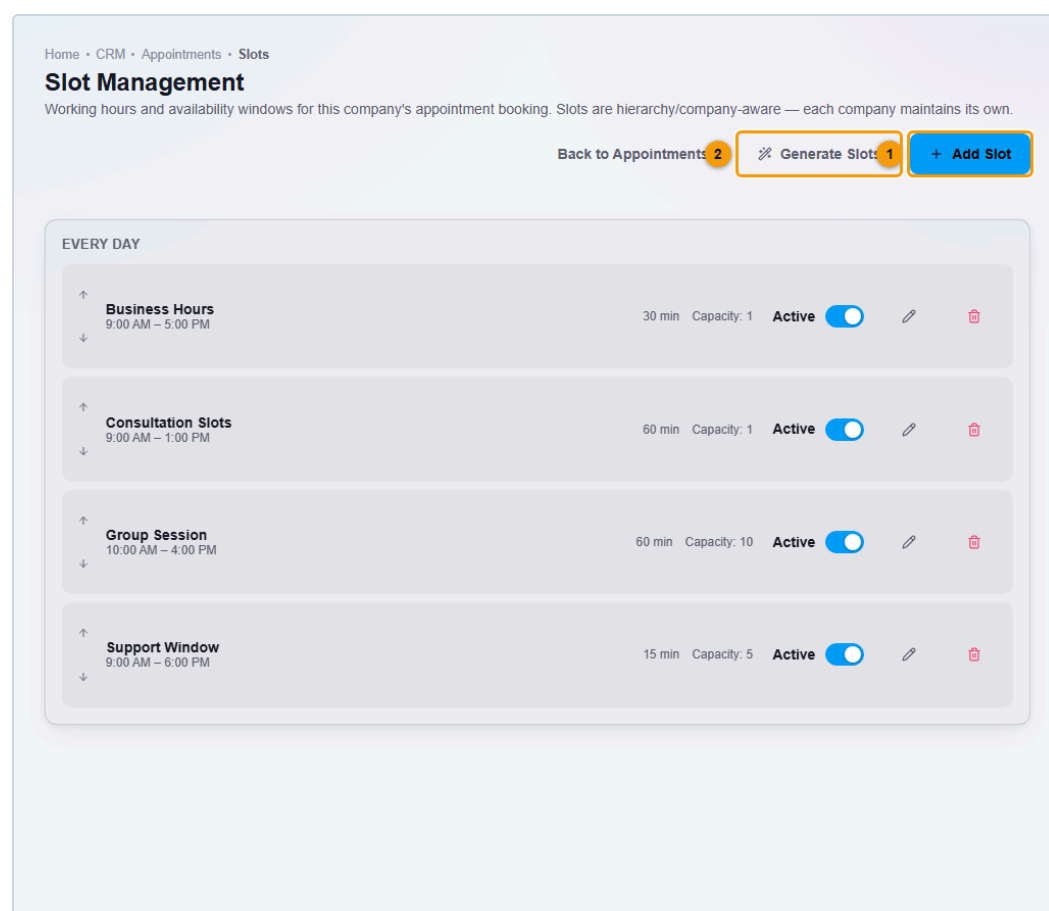
Plan: CRM Basic, Business, Pro and Agency

What this does

Appointments keep your meetings with clients in one place. You choose a date, a meeting length and one of the open time slots of the owner, and the appointment then moves through **scheduled**, **confirmed** and **completed**, with an outcome you record at the end.

Before you start

Your company needs working-hour windows, called slots. Open **CRM**, then **Appointments**, then **Slots** to see them.



Add Slot (1) and Generate Slots (2). Each row is a window such as Business Hours, 9:00 AM to 5:00 PM.

If the list is empty, click **Add Slot** (1) and enter a **Name**, the **Day**, the **Duration (min)** of one slot, the **Max bookings** (0 means unlimited), and the **Start time** and **End time**. Click **Save Slot**. Use the switch on a row to stop offering a window.

Book an appointment

1. Open **CRM**, then **Appointments**.

Home • CRM • Appointments

Appointments

Schedule, track, and complete appointments across leads, deals, and direct clients.

Calendar Analytics 2 Slots Outcome: 1 + Add Appointment

DATE: All time x VIEW: My Appointments x

Click a row to select it, double-click to open the profile, right-click for actions.

Columns						
APPOINTMENT	WHEN	STATUS	PRIORITY	TYPE	LO	
Search title	From To	All	All	All		
No appointments found						

20 / page v

Prev Page 1 of 1 Next

Add Appointment (1), Slots (2) and Calendar (3).

2. Click **Add Appointment** (1).
3. Enter the **Title** (1), choose the **Owner** (2), and enter the client's **Name** (3), **Email** and **Phone**.

Keep the conversation, context and timing together so the team can book faster without hunting across multiple screens.

Fri, Oct 16

Selected date

60 min

Duration

Open

Pick a slot

APPOINTMENT DETAILS

TITLE *

Product demo for Raza Te

TYPE

None

LOCATION TYPE *

Office

LOCATION DETAILS

PRIORITY

None

OWNER *

Ayesha Khan

WHO IS THIS WITH?

Direct Client

Ayesha Khan

60 minute slot

APPOINTMENT SOURCE *

Direct Client

CLIENT NAME *

Usman Raza

CLIENT COMPANY

Raza Textiles

CLIENT EMAIL *

usman@raza-textiles.exan

CLIENT PHONE *

0345-9998887

SECONDARY PHONE

LIVE AVAILABILITY

Pick a date, then choose an open slot

Smart booking

CALENDAR

October 2026

SUN

MON

TUE

WED

THU

FRI

SAT

27

28

29

30

1

2

3

4

5

6

7

8

9

10

11

12

13

14

15

16

17

18

19

20

21

22

23

24

25

26

27

28

29

30

31

1

2

3

4

5

6

7

Date

Fri, Oct 16

Owner

Ayesha Khan

Duration

60 min

Cancel

Create Appointment

Title (1), owner (2) and client name (3).

4. On the calendar at the right, click the **date**.
5. Under **Pick a meeting length**, choose **15, 30, 45, 60, 90** or **120 min**.
6. Under **Available slots**, click an open time. Only free times are shown.

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Meeting length (1), open slot (2) and Create Appointment (3).

7. Click **Create Appointment** (3).

The appointments list covers meetings with leads, deals and direct clients. The steps above book a **Direct Client**.

Confirm, complete or change an appointment

Double-click the appointment to open its profile. The buttons at the top move it along:

Button	What it does
Confirm	Marks the appointment as confirmed.
Reschedule	Moves it to another date and time.
Complete	Closes it and records the outcome.
No-Show	Records that the client did not come.
Cancel	Cancels the appointment.
Assign	Gives it to another teammate.

Home • CRM • Appointments • Product demo for Raza Textiles

←

Product demo for Raza Textiles

UR

Product demo for Raza Textiles

usman@raza-textiles.example 0345-9998887 10/19/2026 9:00 AM

scheduled

medium

Confirm

Reschedule

Complete

No-Show

Cancel

Assign

Edit

Delete

OWNER

Ayesha Khan

DURATION

60 min

PARTICIPANTS

1

CREATED

10/16/2026

Overview

Notes

Tasks

Files

Participants

Video Meeting

Activity

Invoice

STATUS

Scheduled

OWNER

Ayesha Khan

LOCATION

Office

OUTCOME

—

TYPE

—

SOURCE

Direct_client

SCHEDULED

10/19/2026 9:00 AM

PRIORITY

Medium

COMPANY

Raza Textiles

TIMEZONE

UTC

The profile with its action buttons and tabs: Overview, Notes, Tasks, Files, Participants, Video Meeting, Activity and Invoice.

Record the outcome

1. Click **Complete**.
2. Choose the **Outcome**, for example **Interested**, **Proposal Requested** or **Closed Won**.
3. Add **Outcome notes**, and a **Next action** with a **Follow-up date** if you need one.
4. Click **Mark Complete**.

Complete Appointment

1

OUTCOME

Interested

2

OUTCOME NOTES

Client liked the demo and asked for a quote.

NEXT ACTION

FOLLOW-UP DATE

Select date

Cancel

3

Mark Complete

Outcome (1), outcome notes (2) and Mark Complete (3).

The profile shows the status **completed** with the outcome and your notes. **Revert to Scheduled** is available if you completed it by mistake.

Home
CRM
Appointments
Product demo for Raza Textiles

Product demo for Raza Textiles

UR

Product demo for Raza Textiles
usman@raza-textiles.example
0345-9998887

Revert to Scheduled
Assign
Edit
Delete

10/19/2026 9:00 AM

completed
medium
Interested

OWNER

DURATION

PARTICIPANTS

CREATED

Ayesha Khan

60 min

1

10/16/2026

Overview

Notes

Tasks

Files

Participants

Video Meeting

Activity

Invoice

STATUS

Completed

OWNER

Ayesha Khan

LOCATION

Office

OUTCOME

Interested

OUTCOME NOTES

Client liked the demo and asked for a quote.

TYPE

—

SOURCE

Direct_client

SCHEDULED

10/19/2026 9:00 AM

PRIORITY

Medium

COMPANY

Raza Textiles

TIMEZONE

UTC

The outcome and notes are kept on the appointment.

Important notes

- Slots belong to the company you are working in. Each company keeps its own working hours.
- Use **Calendar** at the top of the list to see appointments by month, week or day.

Related guides

- [The lead profile](#)
- [Tasks and follow-ups](#)
- [Deals](#)

Import leads from a CSV file

Add many leads at once from a spreadsheet saved as a CSV file.

Plan: CRM Basic, Business, Pro and Agency

What this does

If you already have your leads in a spreadsheet, you can import them instead of typing each one.

Before you start

- Save your spreadsheet as a **CSV** file. The first row must have column headings. The file can be up to 10 MB.
- Each lead needs at least one of: first name, last name, email or phone.

Steps

1. Open **CRM**, then **Leads**, then **All Leads**.
2. Click **Import Leads**.

Import Leads [X]

Upload a **CSV file** (up to 10 MB). The first row must contain column headers. You will match columns on the next step. At least one of First Name, Last Name, Email or Phone must be matched. Status, Source, Pipeline, Stage and Assigned To are matched by name against your own CRM setup.

1 [Download CSV template]

2 [Choose a .csv file]

Cancel 3 [Upload & Continue]

Download the template, choose your file, then continue.

3. Click **Download CSV template** if you want a ready-made file to fill in.
4. Click **Choose a .csv file** and pick your file.
5. Click **Upload & Continue**.
6. On the next step, match each column in your file to a lead field.

What happens next

NEXTOREx matches **Status**, **Source**, **Pipeline**, **Stage** and **Assigned To** by name against your own CRM setup, so the names in your file should match the names in your CRM.

Important notes

- Only CSV files are supported for import.

Related guides

- [Create a lead](#)