|  |  |  |
| --- | --- | --- |
| **Lead Summary** | **Lead Number**[LeadNumber]**Lead Date**[LeadCreationDate]**Lead Expected Close Date**[LeadForecastCloseDate]**Lead Won or Lost Date**[LeadWonOrLostDate] |  |
| **[ClientName]**[ClientAddress1][ClientAddress2][ClientCity] [ClientState] [ClientPostcode][ClientABN][LeadContactFullName][LeadContactEmail][LeadContactPhone1][LeadContactPhone2] |  | **[BusinessLegalName]**[BusinessAddress][BusinessTaxNumber][LeadOwnerFullName][LeadOwnerEmail][LeadOwnerPhone] |

**[LeadName]**

[LeadDescription]

|  |  |  |  |
| --- | --- | --- | --- |
| **Budget** | [LeadBudget] | **Category** | [LeadCategory] |
| **Close Probability** | [LeadCloseProbability] | **Stage** | [LeadStage] |
| **Status** | [LeadStatus] |  |  |

**Lead Activities**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Activity** | **Staff** | **Description** | **Due Date** | **Completed Date** |
| [LeadActivityType] | [LeadActivityFullName] | [LeadActivityDescription] | [LeadActivityDueDate] | [LeadActivityCompletedDate] |

**Notes:**