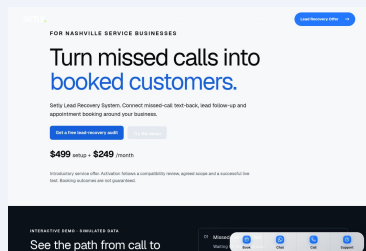


Create a lead intake sheet

Capture enough information to take the next useful action.



FROM THE SETLY PROJECT LIBRARY

A real project screenshot for visual inspiration. Follow the written steps for your own business.

YOUR ACTION PLAN

- 1 Record the enquiry source and time received.
- 2 Capture the requested service and preferred contact method.
- 3 Assign an owner, status and next action date.
- 4 Keep notes factual and avoid collecting sensitive information that is unnecessary for the enquiry.

EXAMPLE - ILLUSTRATIVE

A landscaping enquiry records the requested job and callback preference before scheduling a site visit.

CHECK YOUR RESULT

Can a teammate continue the conversation from the record?

Create a lead intake sheet

Use the prompts below to make this resource specific to your business. Save a local copy after completing it. Keep passwords and private customer data out of this worksheet.

Received:

Source:

Name:

Requested service:

Preferred contact:

Owner:

Next action:

DONE WHEN

Can a teammate continue the conversation from the record?

FURTHER READING

[HighLevel Support](#)

Independent Setly planning resource. Platform settings and requirements can change; use the linked official help for current configuration details.