



Sales App Tutorial

A walkthrough of how to navigate the features within the sales app of Syniq Business OS.



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How to Add a Lead

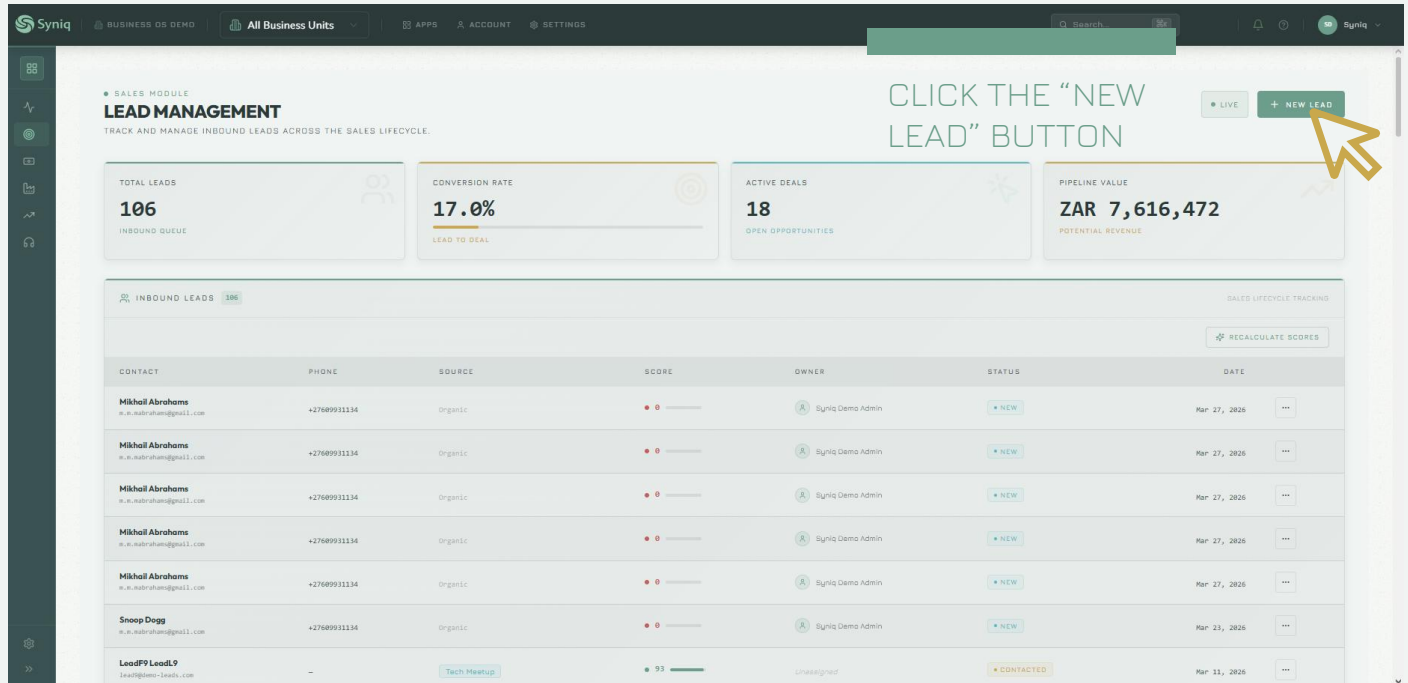


Figure 1: Add Lead Step 1

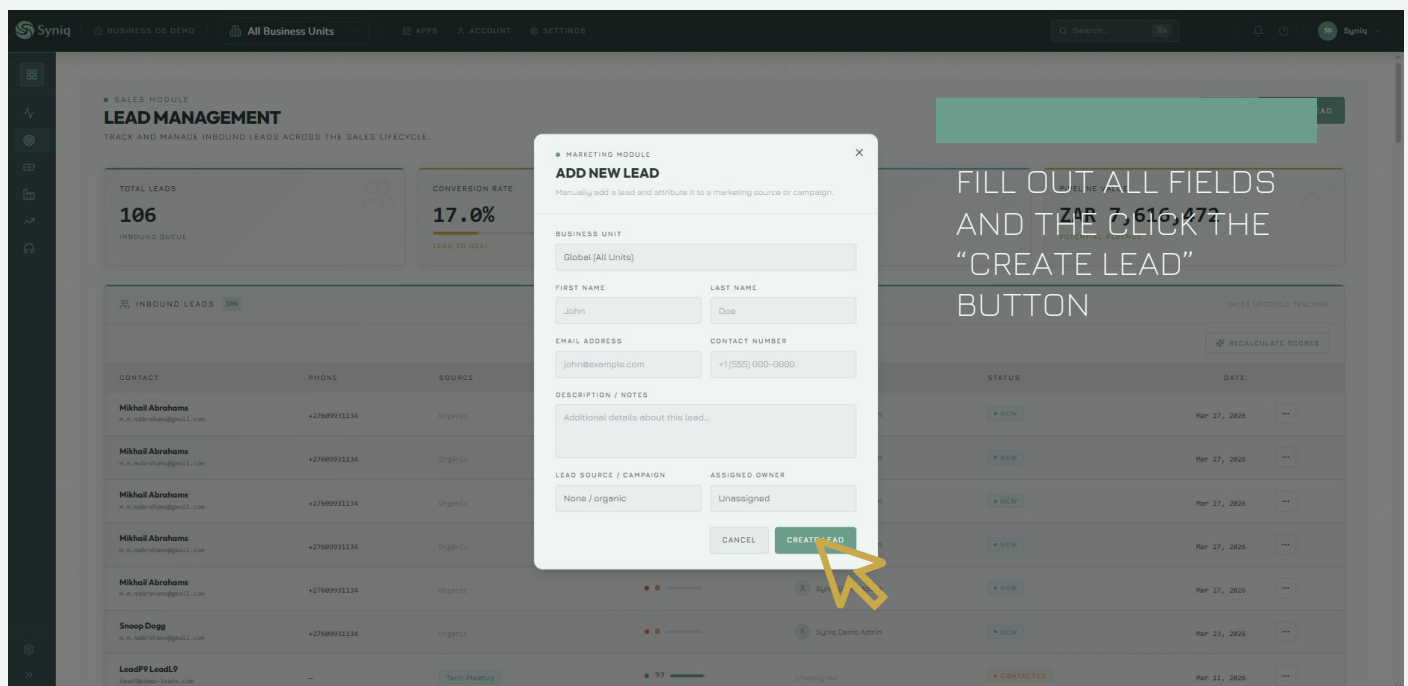


Figure 2: Add Lead Step 2

How to Edit a Lead

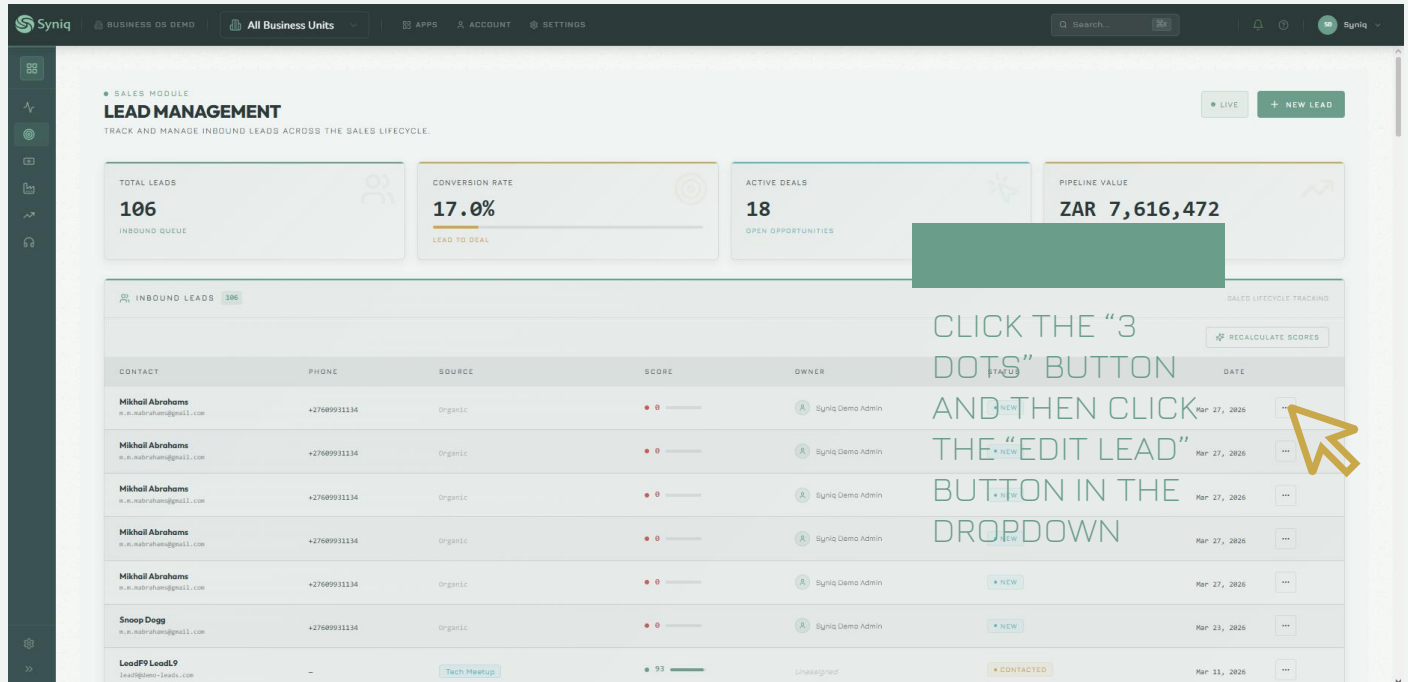


Figure 3: Edit Lead Step 1

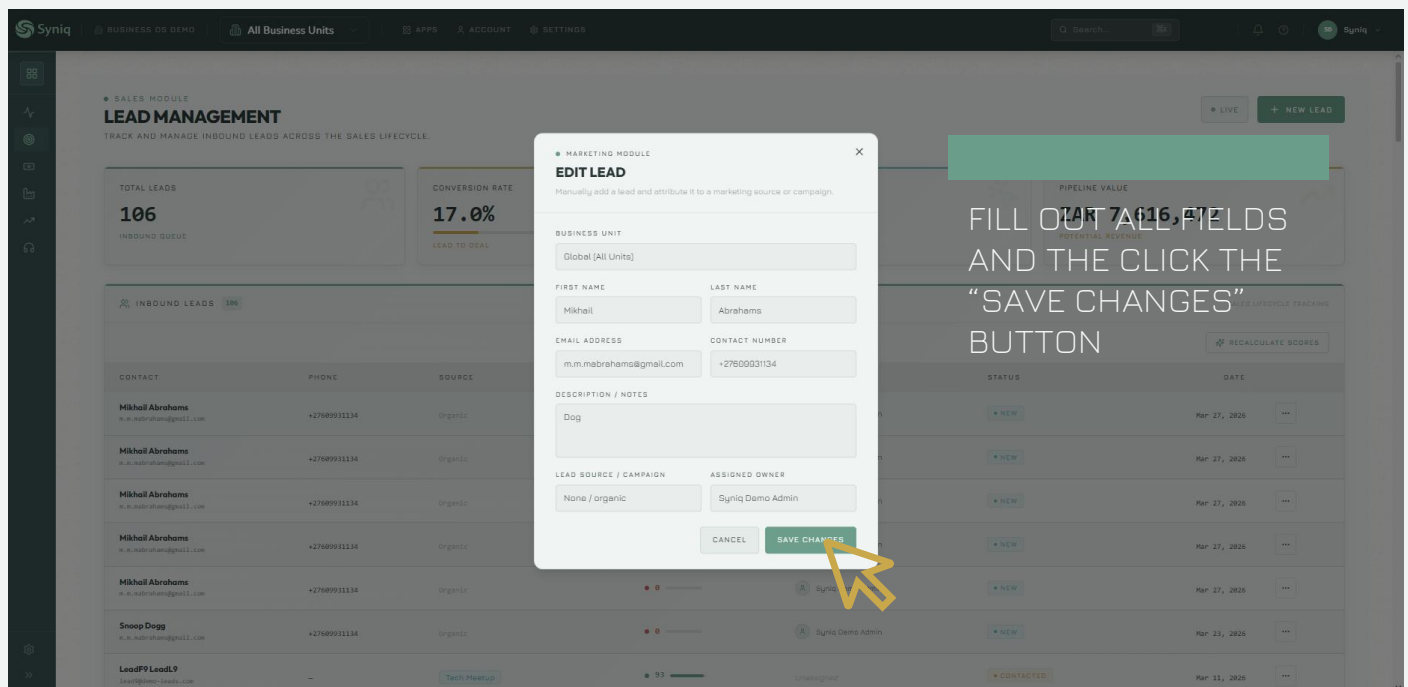
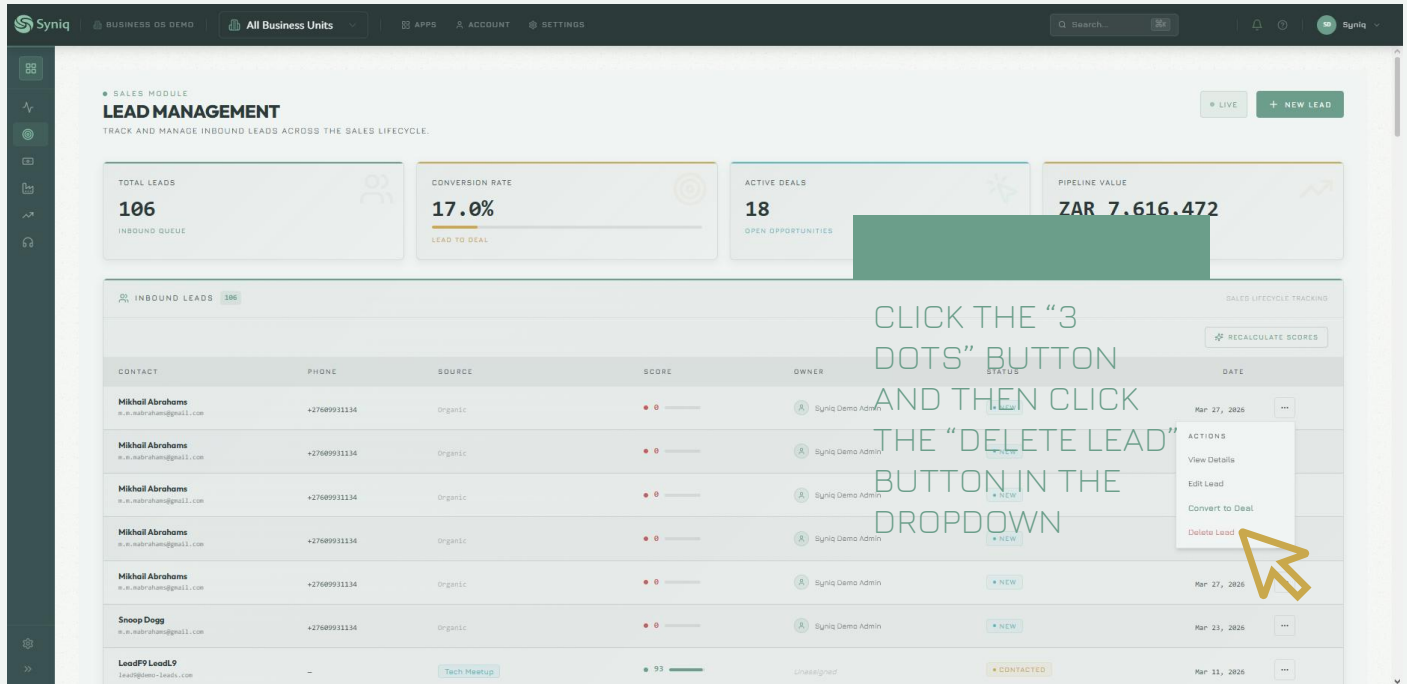


Figure 4: Edit Lead Step 2

How to Delete a Lead



LEAD MANAGEMENT
TRACK AND MANAGE INBOUND LEADS ACROSS THE SALES LIFECYCLE.

TOTAL LEADS 106
INBOUND QUEUE

CONVERSION RATE 17.0%
LEAD TO DEAL

ACTIVE DEALS 18
OPEN OPPORTUNITIES

PIPELINE VALUE ZAR 7,616,472
POTENTIAL REVENUE

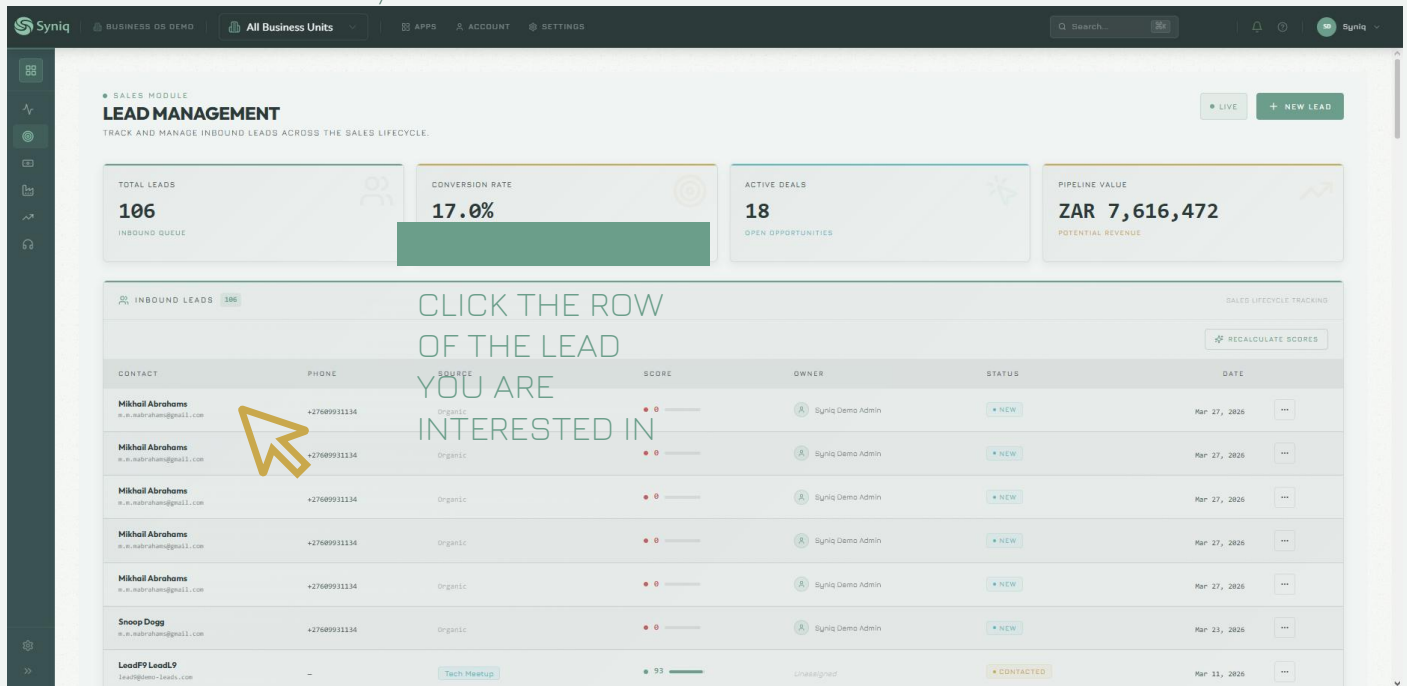
INBOUND LEADS 106

CONTACT	PHONE	SOURCE	SCORE	OWNER	STATUS	DATE
Mikhail Abrahams m.m.abrahams@syniq1.com	+2760991134	Organic	0	Syniq Demo Admin	NEW	Mar 27, 2026
Mikhail Abrahams m.m.abrahams@syniq1.com	+2760991134	Organic	0	Syniq Demo Admin	NEW	Mar 27, 2026
Mikhail Abrahams m.m.abrahams@syniq1.com	+2760991134	Organic	0	Syniq Demo Admin	NEW	Mar 27, 2026
Mikhail Abrahams m.m.abrahams@syniq1.com	+2760991134	Organic	0	Syniq Demo Admin	NEW	Mar 27, 2026
Mikhail Abrahams m.m.abrahams@syniq1.com	+2760991134	Organic	0	Syniq Demo Admin	NEW	Mar 27, 2026
Snoop Dogg s.s.snoop@syniq1.com	+2760991134	Organic	0	Syniq Demo Admin	NEW	Mar 23, 2026
LeadP9 LeadL9 leadp9@syniq-leads.com	-	Tech Meetup	93	Unassigned	CONTACTED	Mar 11, 2026

CLICK THE "3 DOTS" BUTTON AND THEN CLICK THE "DELETE LEAD" BUTTON IN THE DROPDOWN

Figure 5: Delete Lead

How to Add an Activity to a Lead



LEAD MANAGEMENT
TRACK AND MANAGE INBOUND LEADS ACROSS THE SALES LIFECYCLE.

TOTAL LEADS 106
INBOUND QUEUE

CONVERSION RATE 17.0%

ACTIVE DEALS 18
OPEN OPPORTUNITIES

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Mikhail Abrahams m.m.abrahams@syniq1.com	+2760991134	Organic	0	Syniq Demo Admin	NEW	Mar 27, 2026
Snoop Dogg s.s.snoop@syniq1.com	+2760991134	Organic	0	Syniq Demo Admin	NEW	Mar 23, 2026
LeadP9 LeadL9 leadp9@syniq-leads.com	-	Tech Meetup	93	Unassigned	CONTACTED	Mar 11, 2026

CLICK THE ROW OF THE LEAD YOU ARE INTERESTED IN

Figure 6: Add Lead Activity Step 1

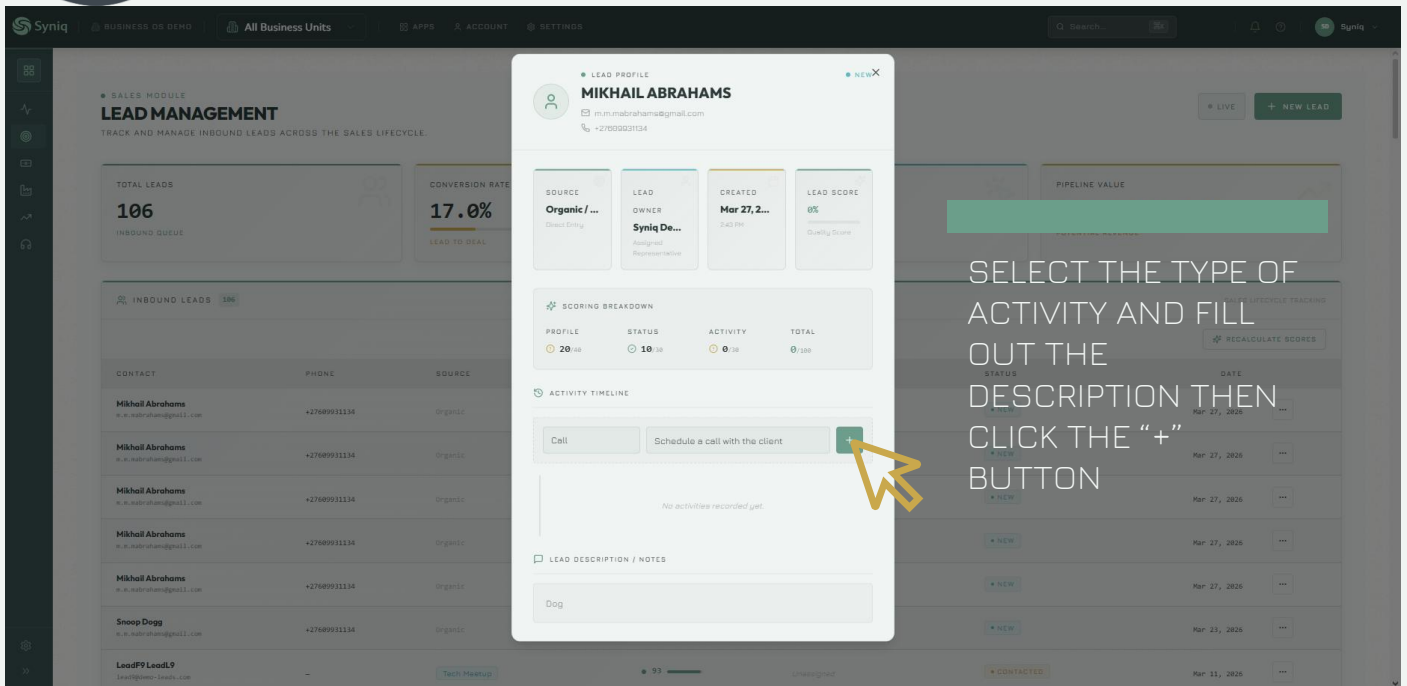


Figure 7: Add Lead Activity Step 2

How to Convert a Lead to a Deal

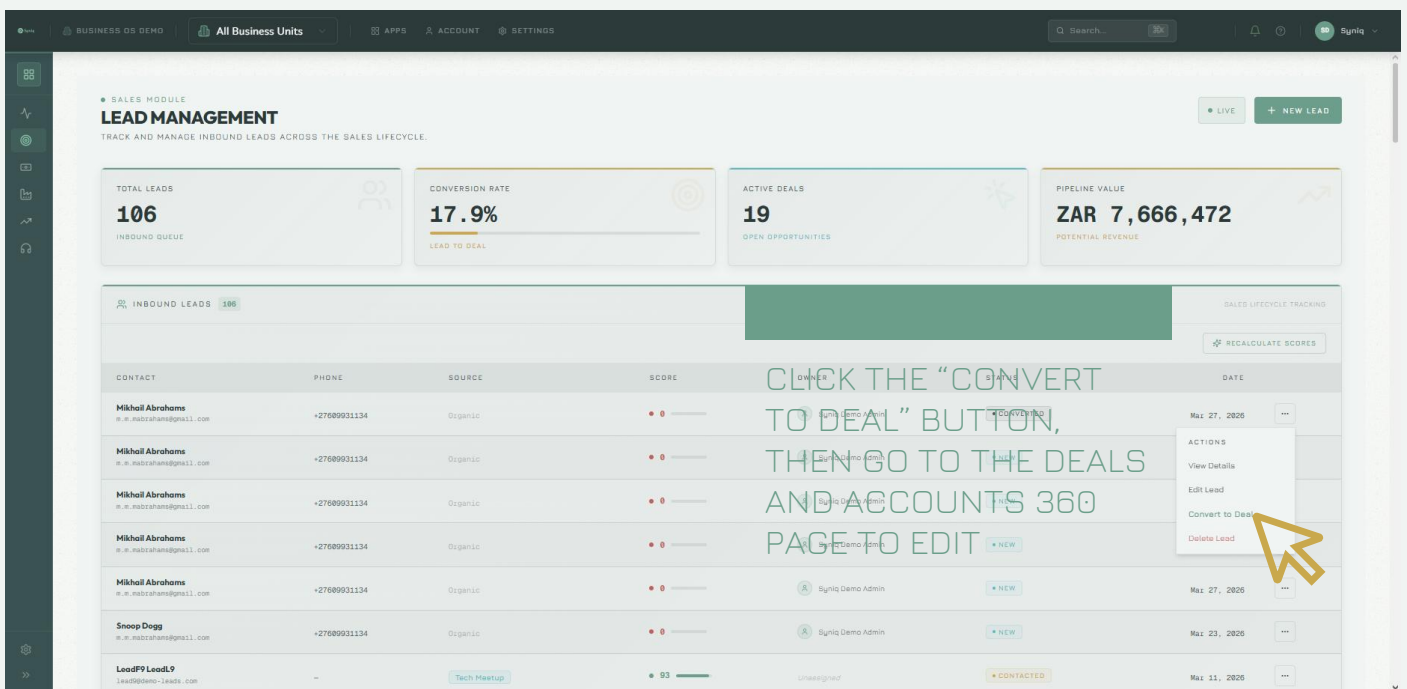


Figure 8: How to convert a Lead to a Deal



Deals Page

How to Add a New Deal

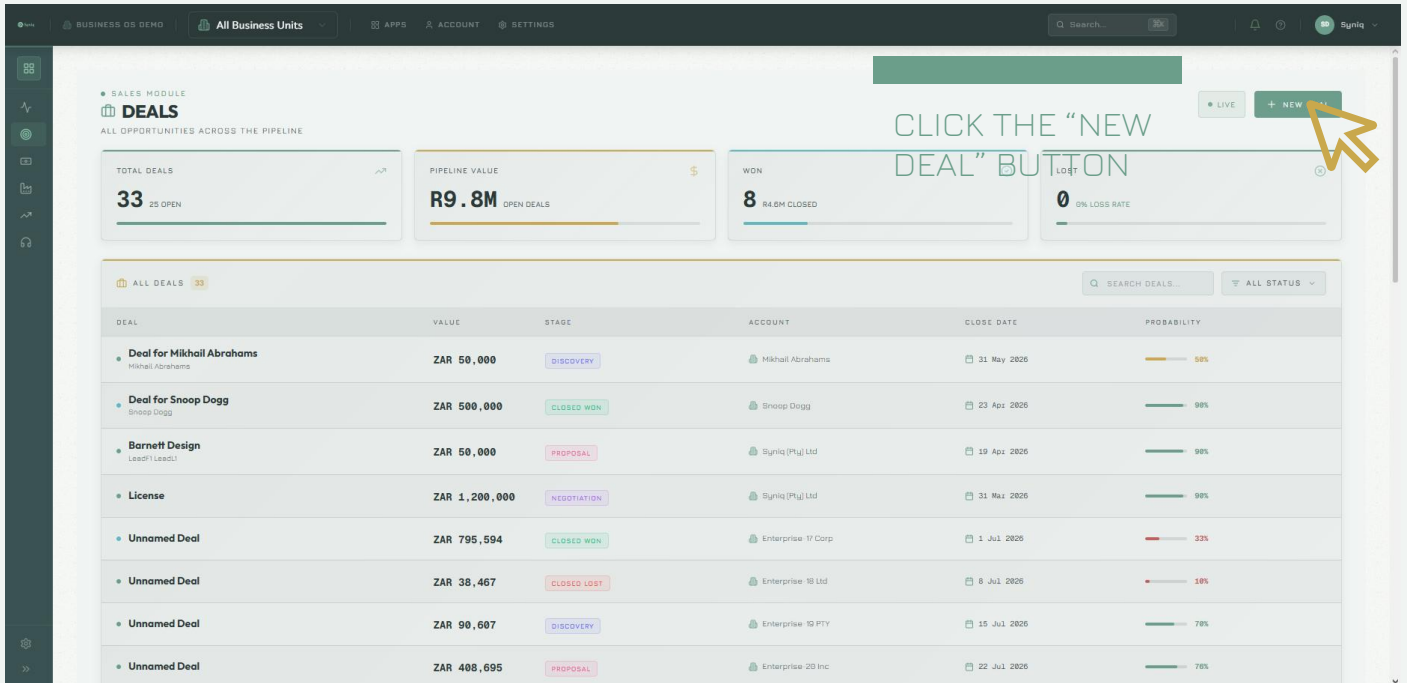


Figure 9: Add a Deal Step 1

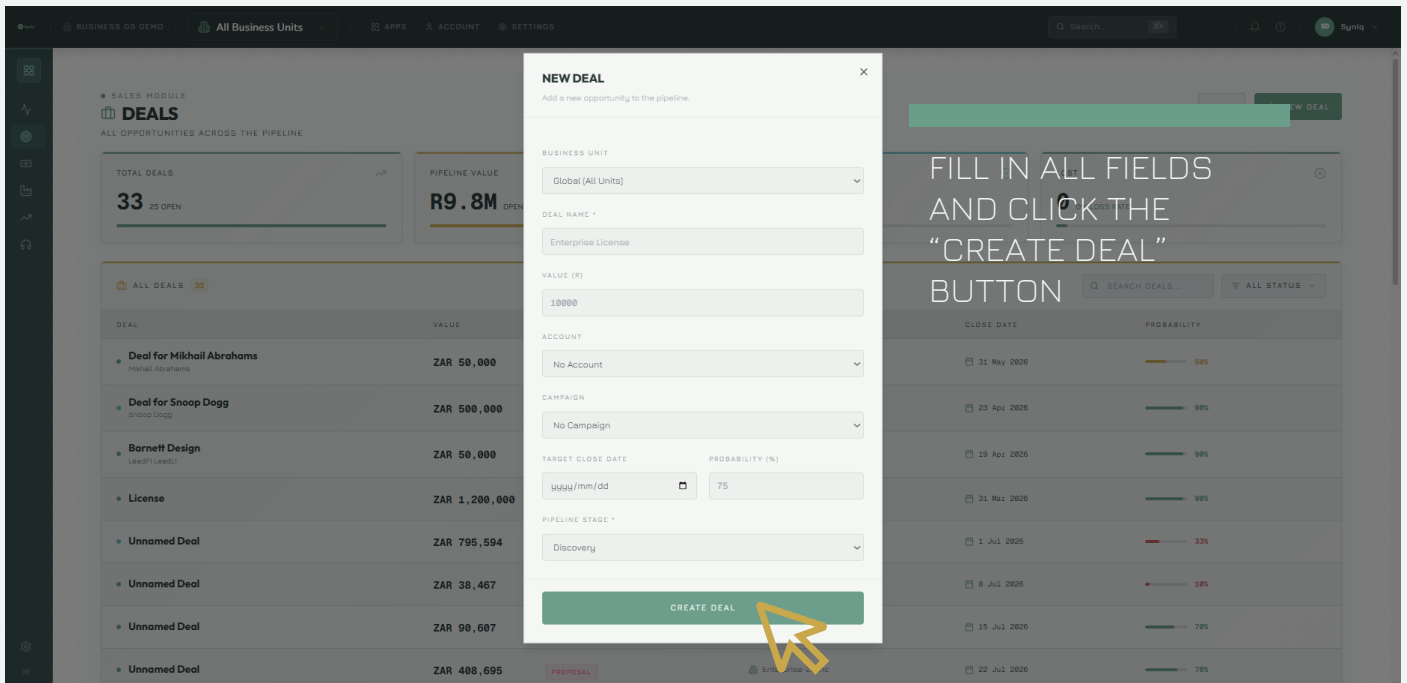


Figure 10: Add a Deal Step 2

How to Edit a Deal

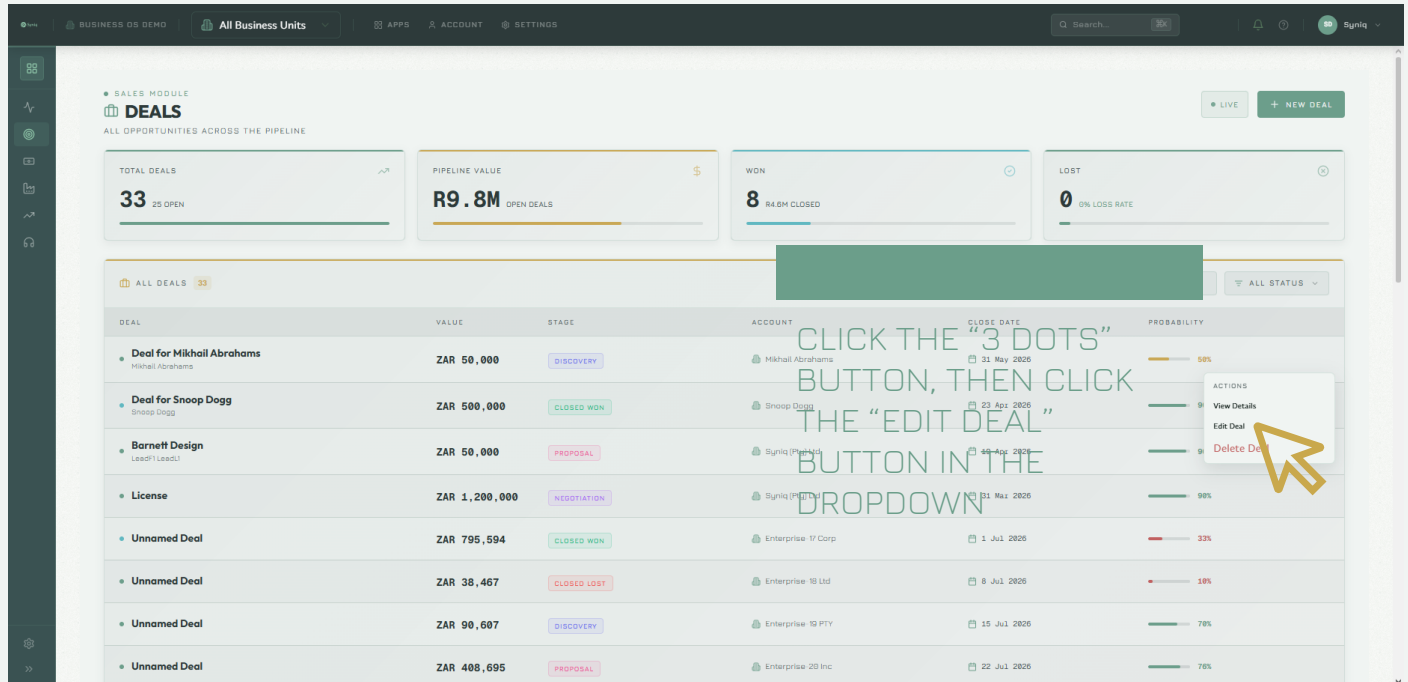


Figure 11: Edit a Deal Step 1

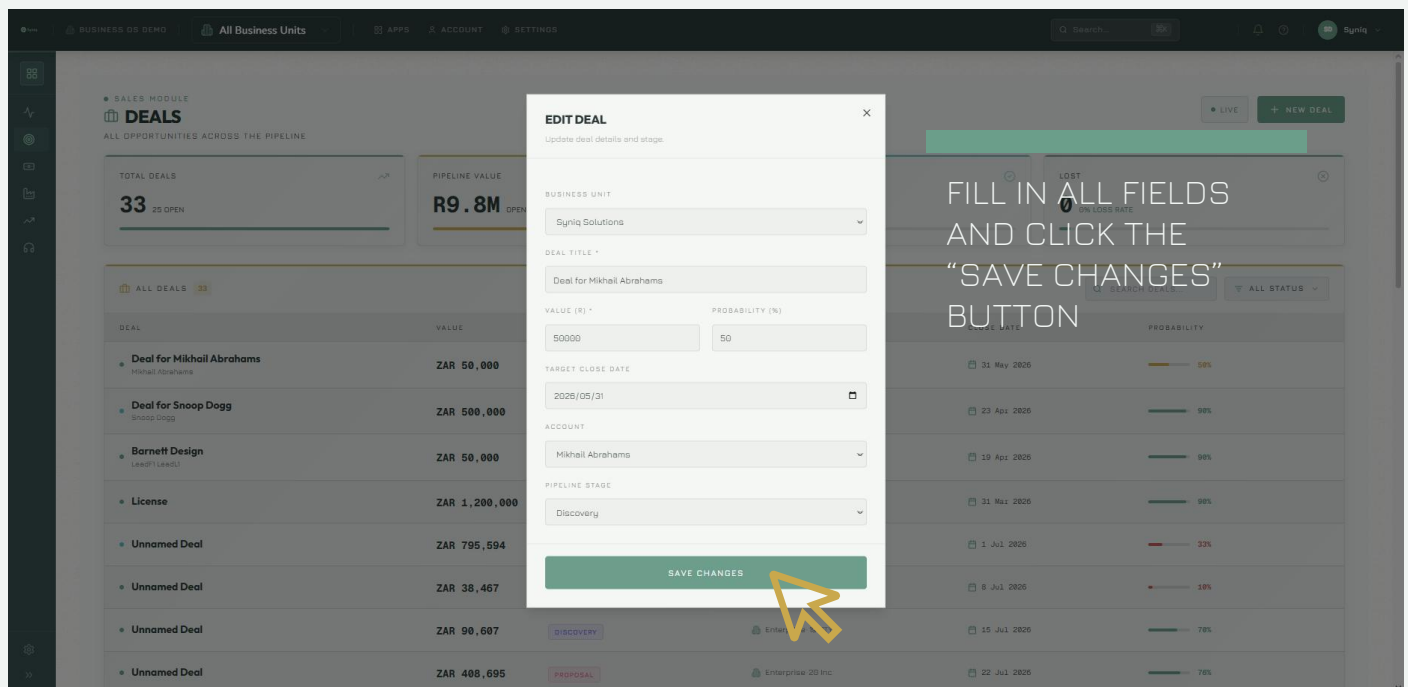


Figure 12: Edit a Deal Step 2

How to Delete a Deal

Figure 13: Delete a Deal

How to View Deal Details

Figure 14: View Deal Details



How to Add an Activity to a Deal

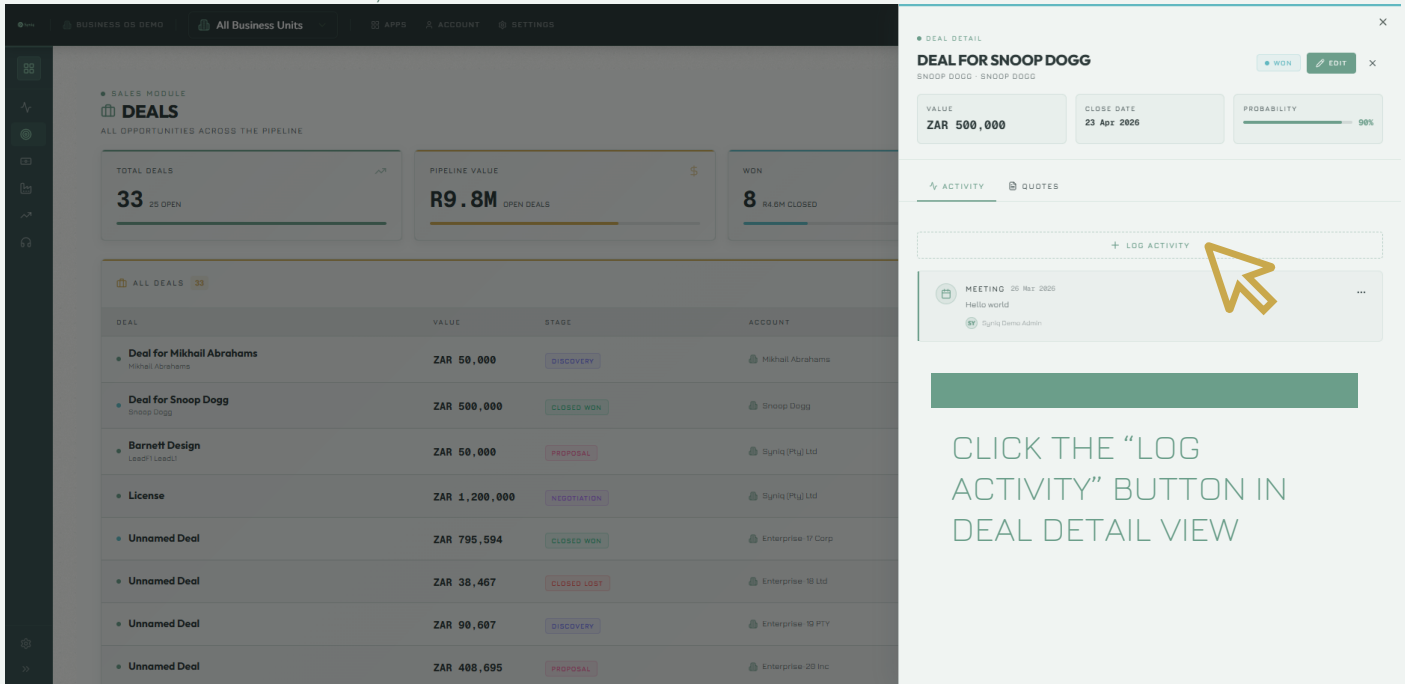


Figure 15: Add Activity to a Deal Step 1

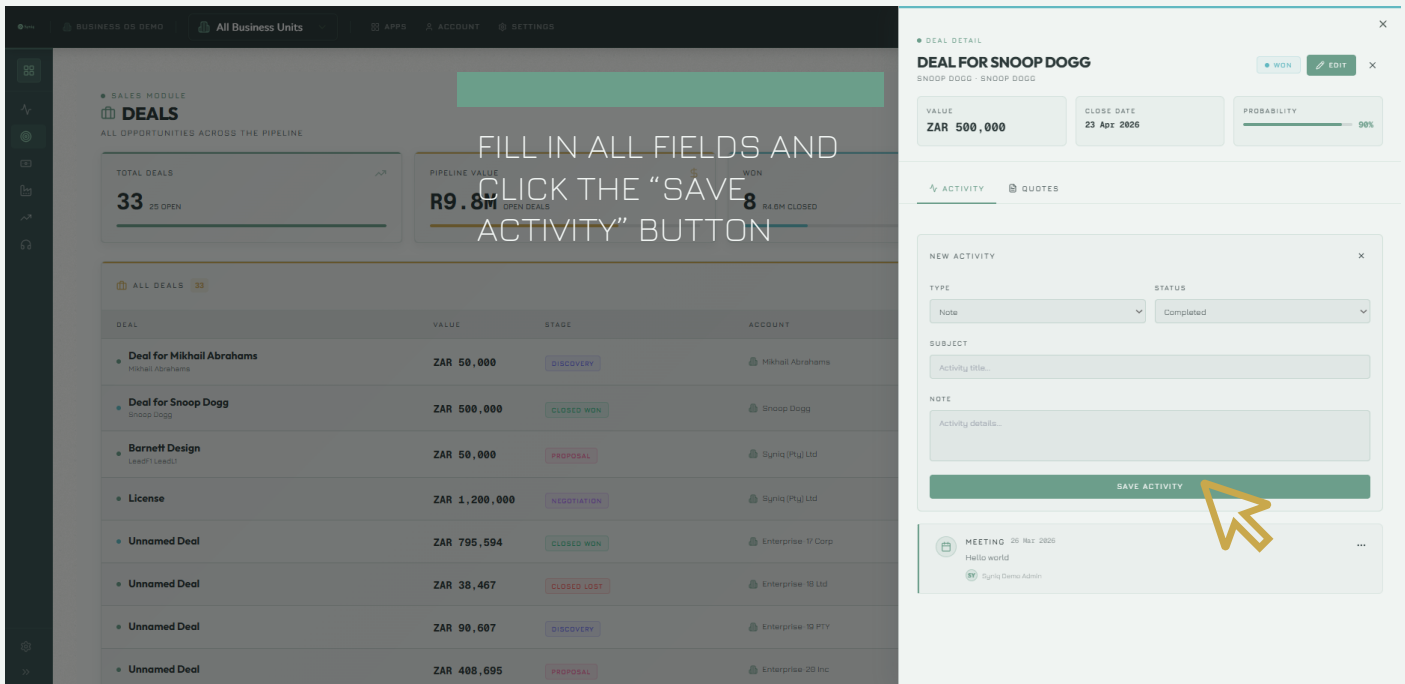


Figure 16: Add Activity to a Deal Step 2



How to Generate a Quote for a Deal

The screenshot shows the Syniq interface. On the left, the 'DEALS' section displays a pipeline overview with 33 total deals, a pipeline value of R9.8M, and 8 won deals. Below this is a table of deals. On the right, the 'DEAL FOR SNOOP DOGG' detail view is shown, including fields for Value (ZAR 500,000), Close Date (23 Apr 2026), and Probability (90%). A yellow arrow points to the '+ GENERATE QUOTE' button in the 'QUOTES' tab, which is highlighted in green. Below the button, a quote preview for 'NAS976994' is visible, showing a value of ZAR 6,666.

DEAL	VALUE	STAGE	ACCOUNT
Deal for Mikhail Abrahams	ZAR 50,000	DISCOVERY	Mikhail Abrahams
Deal for Snoop Dogg	ZAR 500,000	CLOSED WON	Snoop Dogg
Barnett Design	ZAR 50,000	PROPOSAL	Syniq (Pty) Ltd
License	ZAR 1,200,000	NEGOTIATION	Syniq (Pty) Ltd
Unnamed Deal	ZAR 795,594	CLOSED WON	Enterprise- IV Corp
Unnamed Deal	ZAR 38,467	CLOSED LOST	Enterprise- IS Ltd
Unnamed Deal	ZAR 90,607	DISCOVERY	Enterprise- IQ PTY
Unnamed Deal	ZAR 408,695	PROPOSAL	Enterprise- 2D Inc

CLICK THE "QUOTES" BUTTON IN DEAL DETAIL VIEW THEN CLICK "GENERATE QUOTE" BUTTON

Figure 17: Generate Quote for a Deal Step 1

The screenshot shows the Syniq interface. On the left, the 'DEALS' section is visible. On the right, the 'DEAL FOR SNOOP DOGG' detail view is shown, but the 'QUOTES' tab is active, displaying a form to create a quote. A yellow arrow points to the 'CREATE QUOTE' button at the bottom of the form. The form includes fields for Contact Name, Contact Email, Contact Phone, End User, Customer Reference / PO, Line Items (with a table for SKU, Description, Qty, Price, Amount), Memo to Customer, Terms & Conditions, and Internal Notes. A summary box on the right shows Subtotal (ZAR 0), Discount (0), Tax (0), Shipping (0), and Total (ZAR 0). Below the form, a quote preview for 'NAS976994' is visible, showing a value of ZAR 6,666.

SKU	DESCRIPTION	QTY	PRICE	AMOUNT
SKU	Item description	1	0	ZAR 0

Figure 18: Generate Quote for a Deal Step 2

Pipeline Page

How to Edit Pipeline Stages

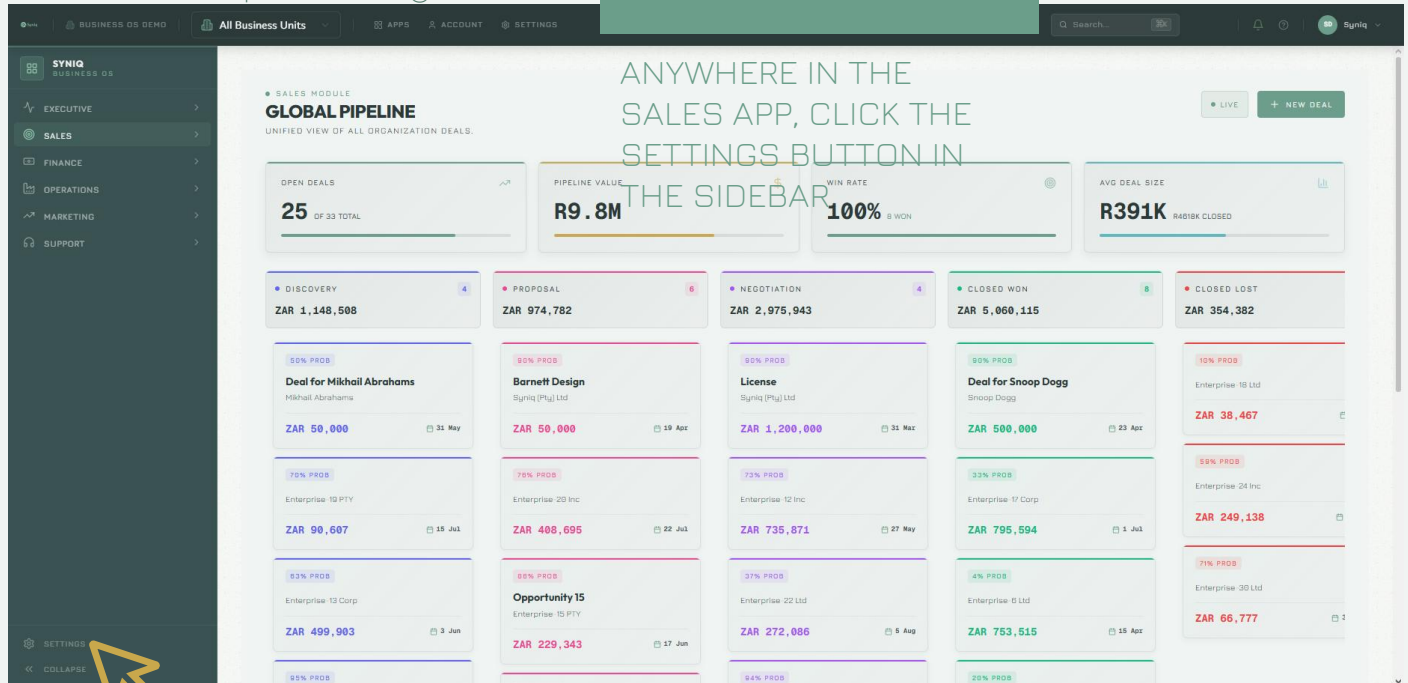


Figure 19: Edit Pipeline Stages Step 1

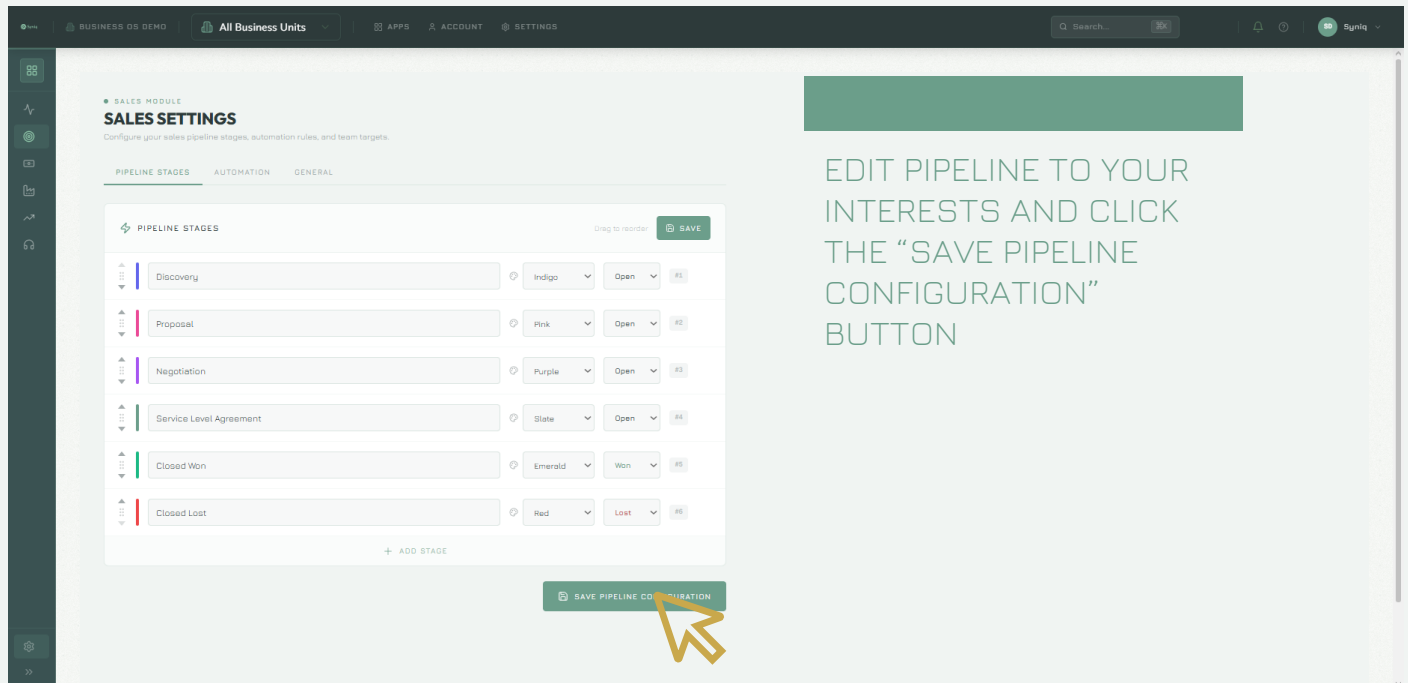


Figure 20: Edit Pipeline Stages Step 2

How to Move Deal to Next Stage

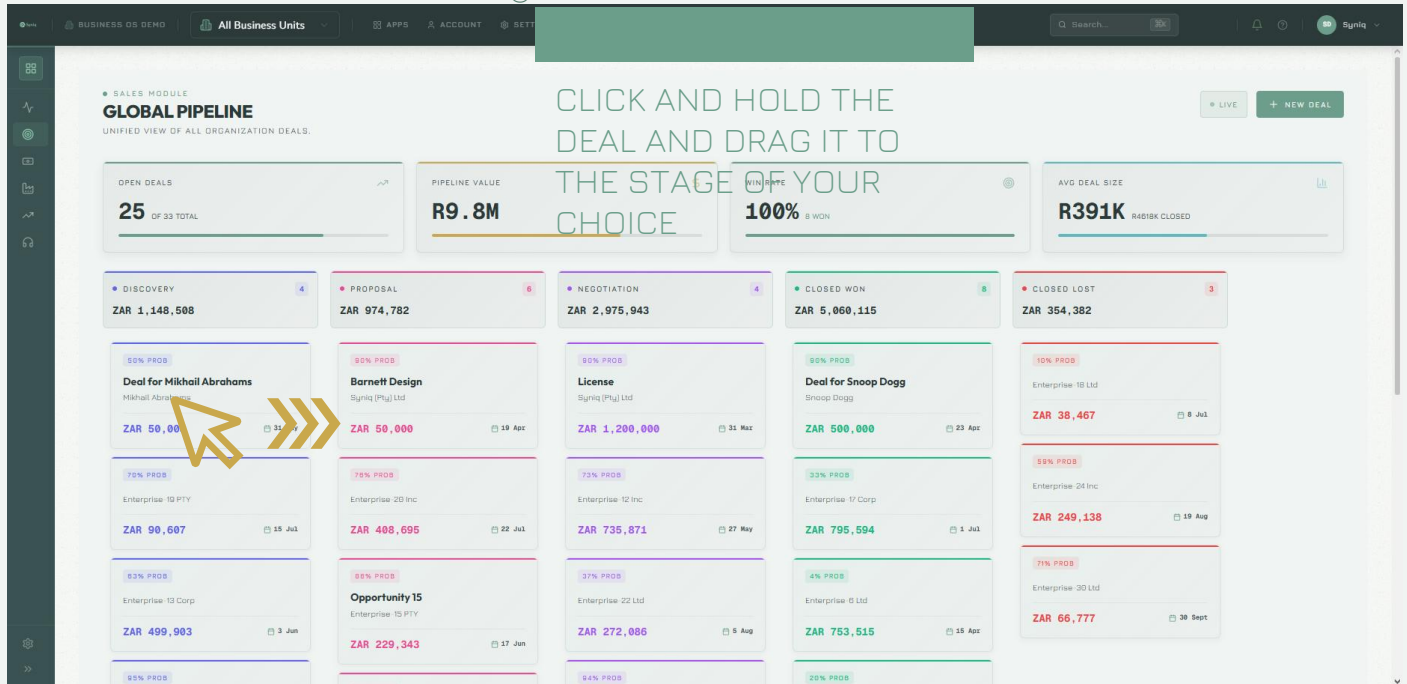


Figure 21: Move Deal to Next Stage

Accounts 360 Page

How to Add an Account

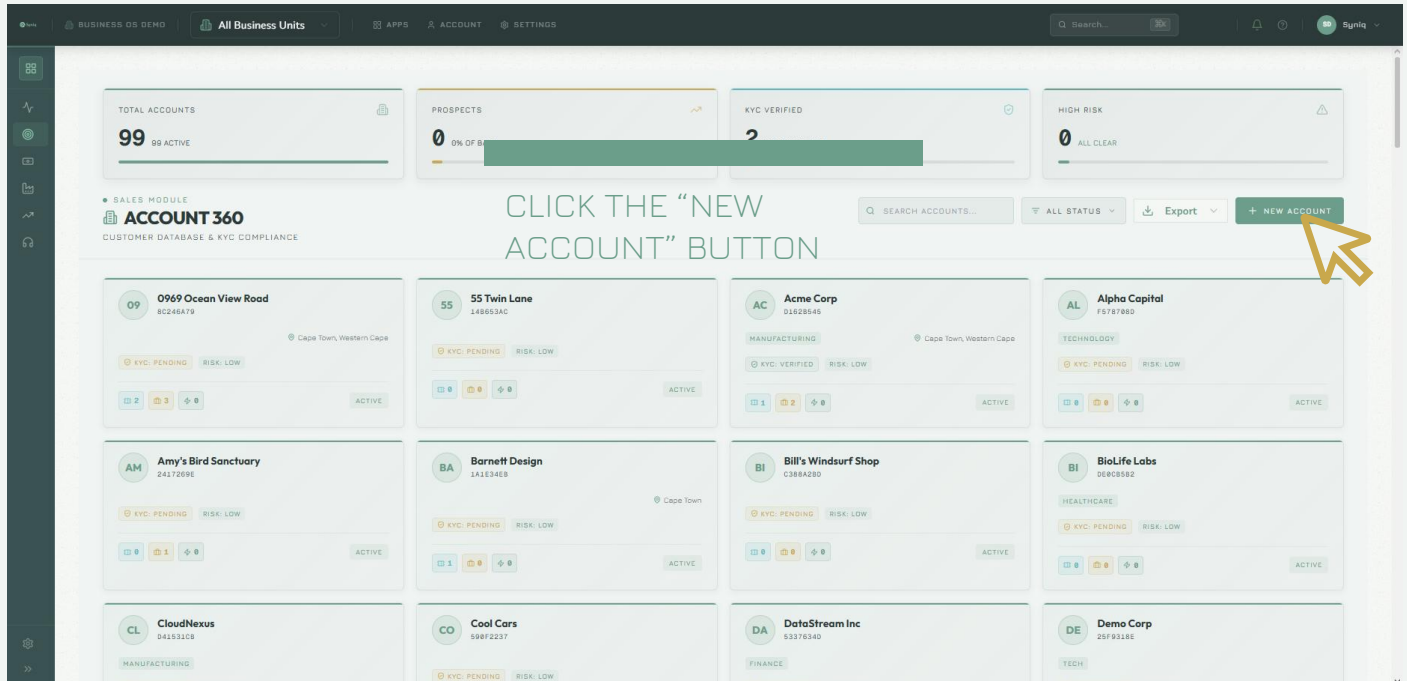


Figure 22: Add Account Step 1

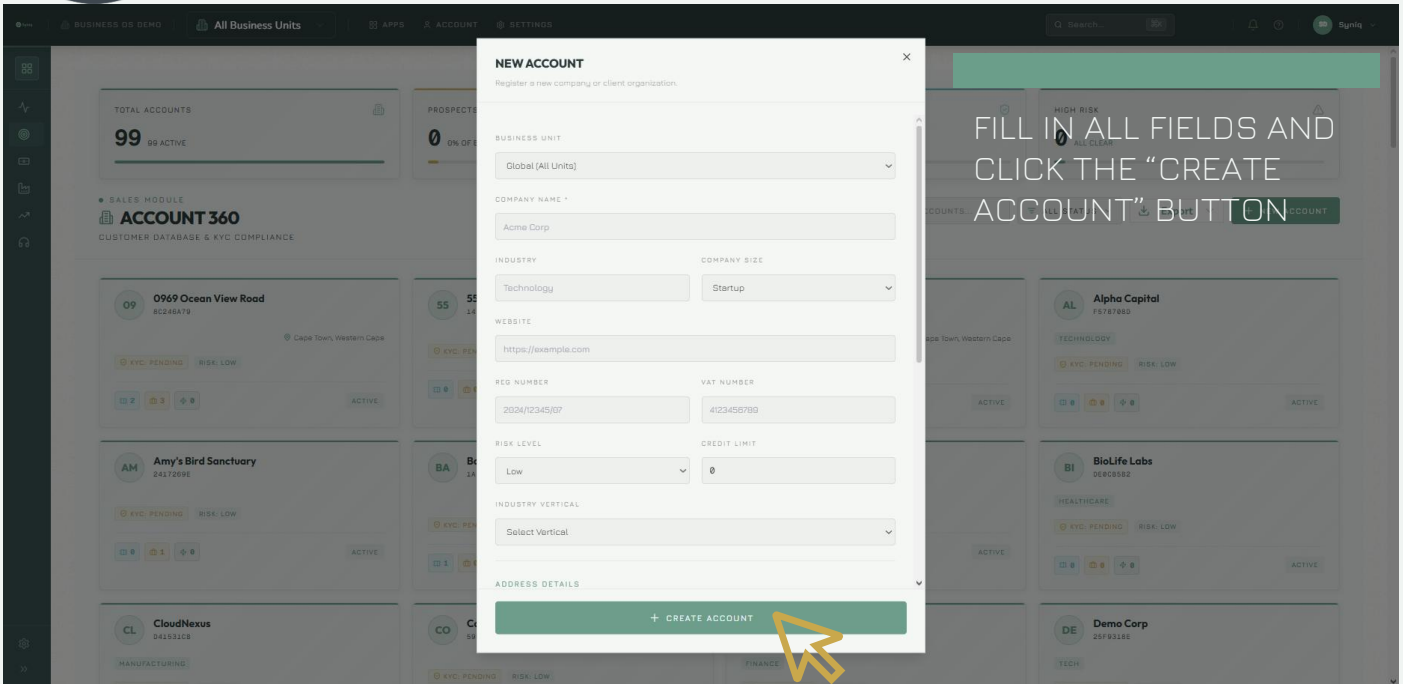


Figure 23: Add Account Step 2

How to Edit an Account

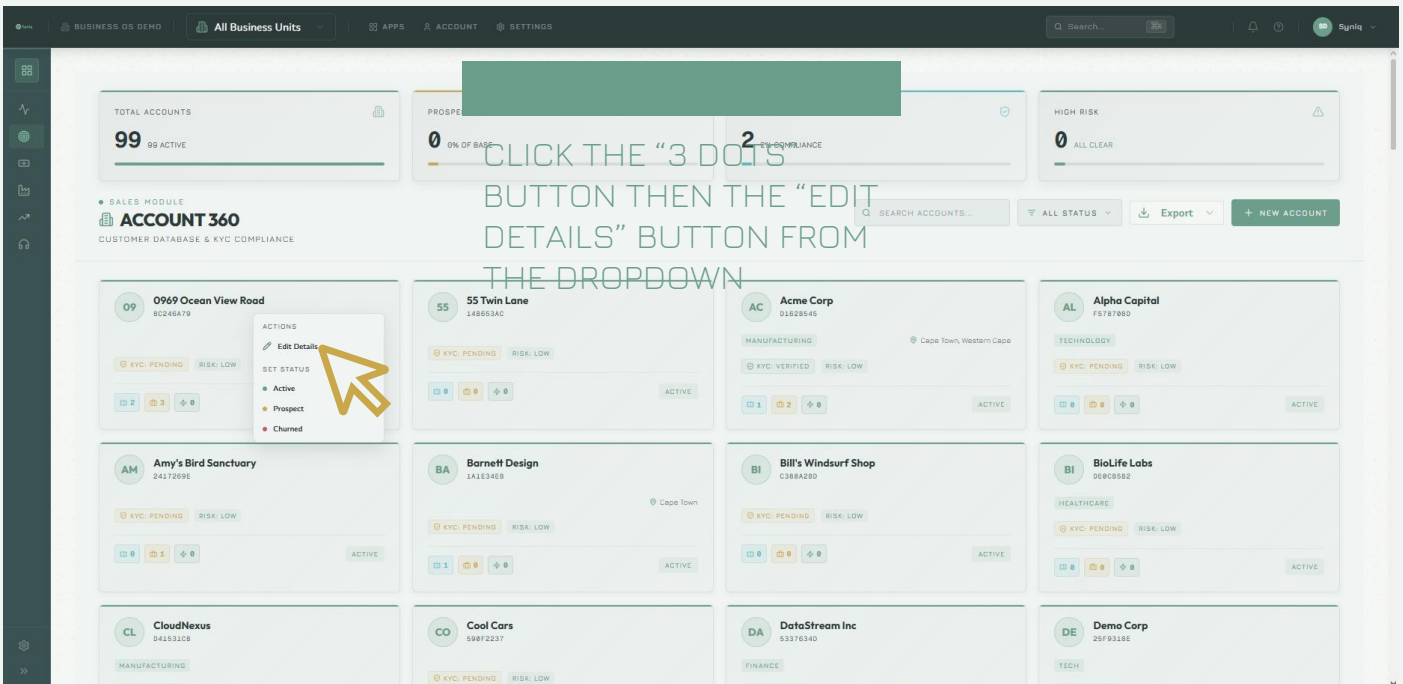


Figure 24: Edit an Account Step 1

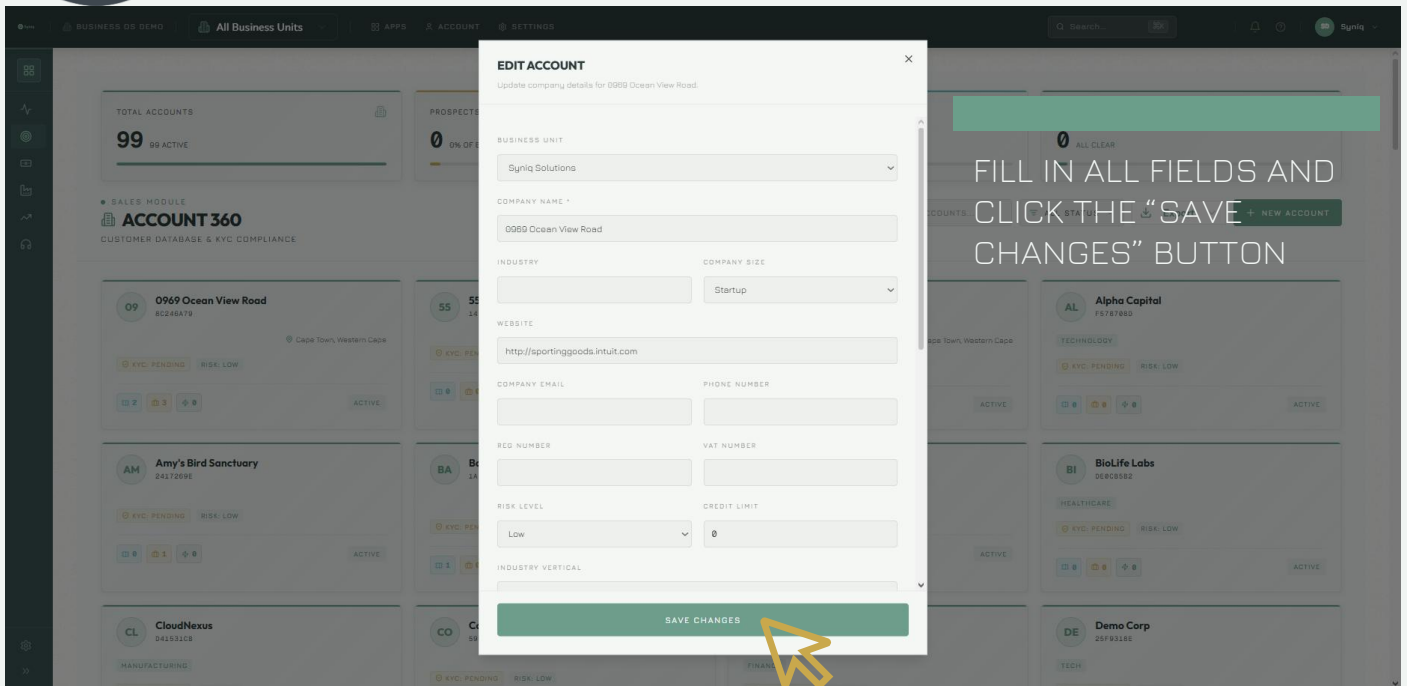


Figure 25: Edit an Account Step 2

How to View Account Details

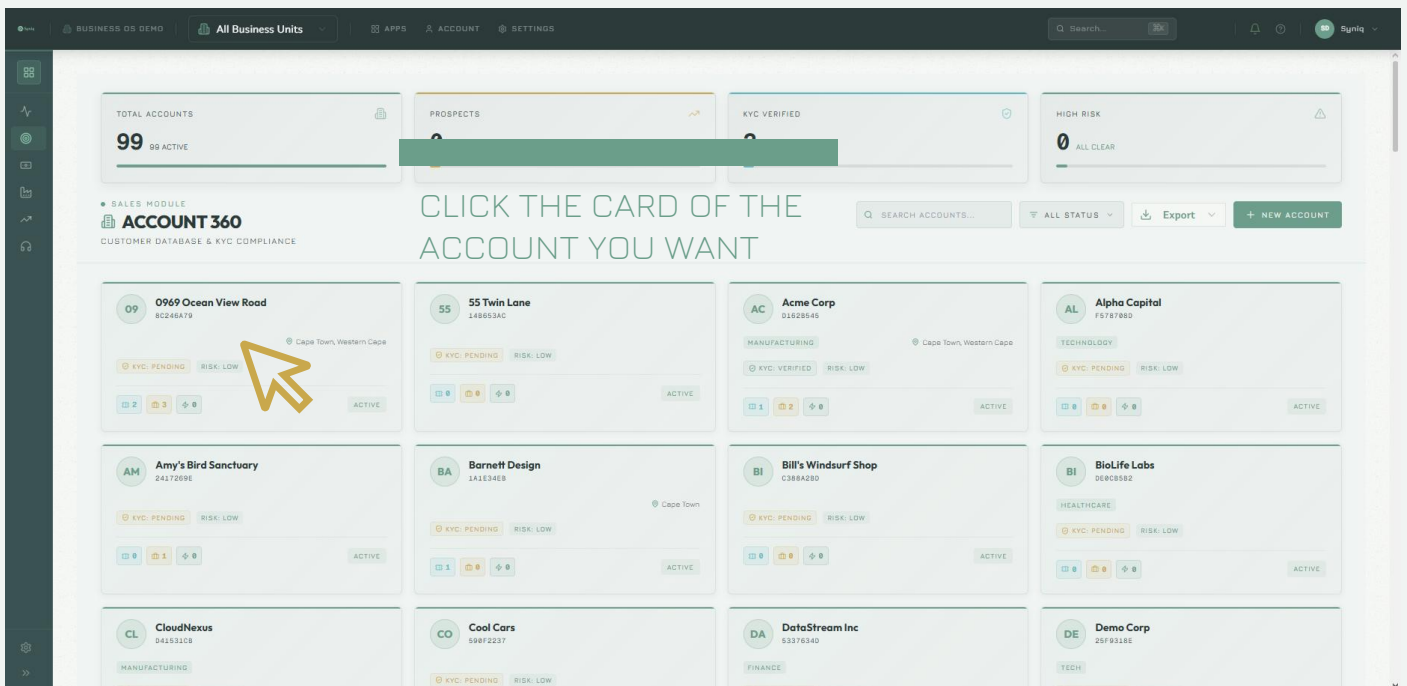


Figure 26: View Account Details

Contacts Page

How to Add a New Contact

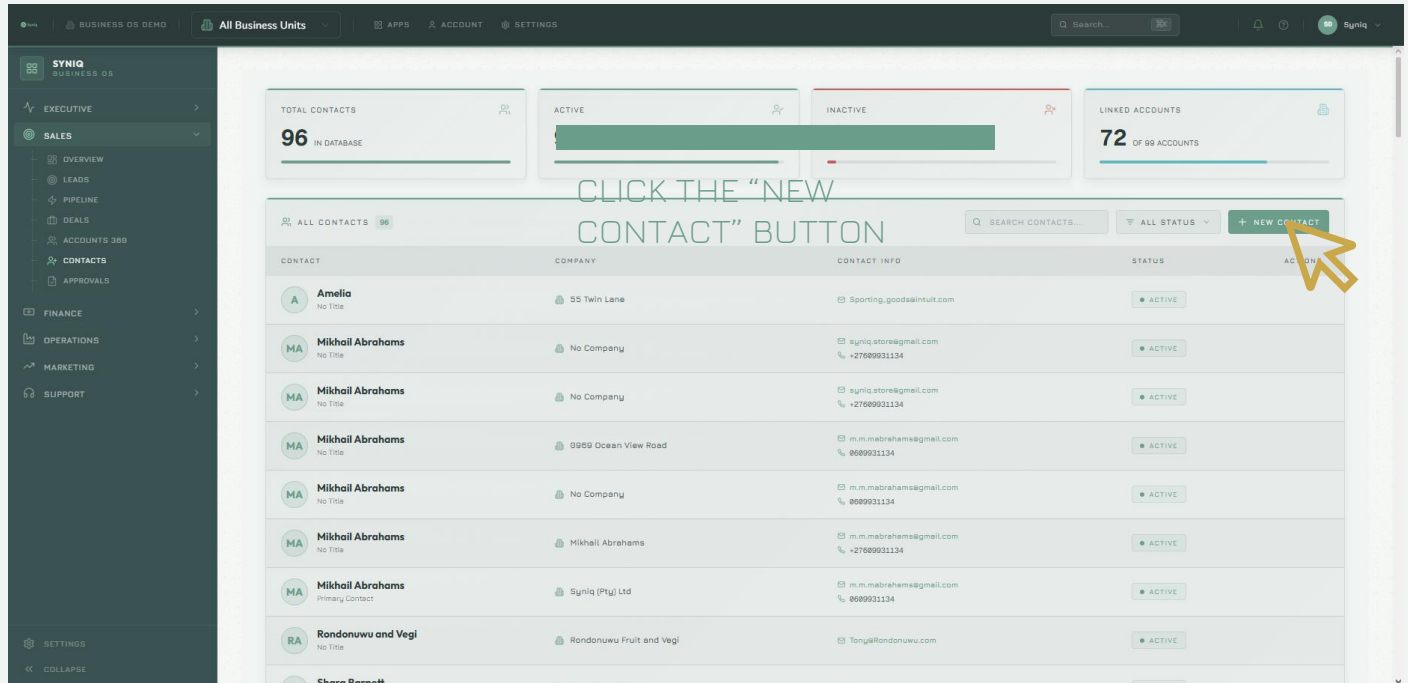


Figure 27: Add a New Contact Step 1

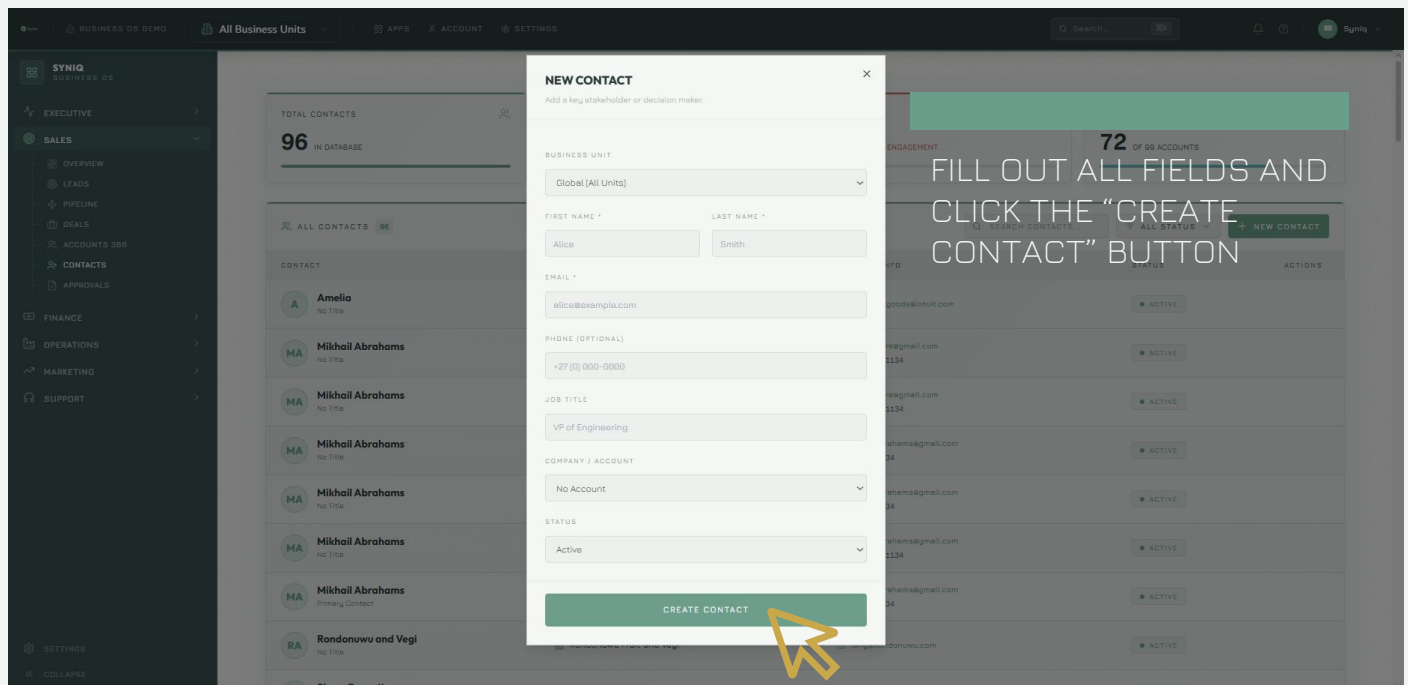


Figure 28: Add a New Contact Step 2

How to Edit a Contact

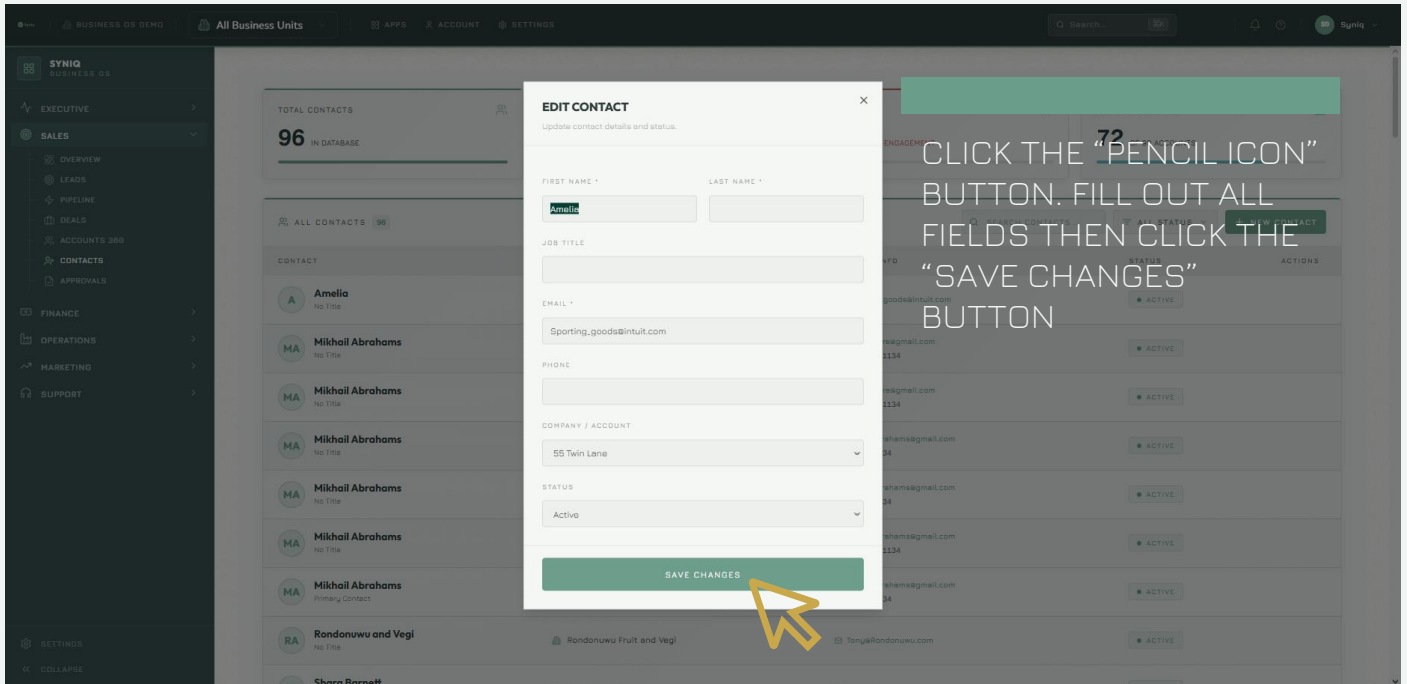


Figure 29: Edit a Contact

How to Message and Book a Meeting with a Contact

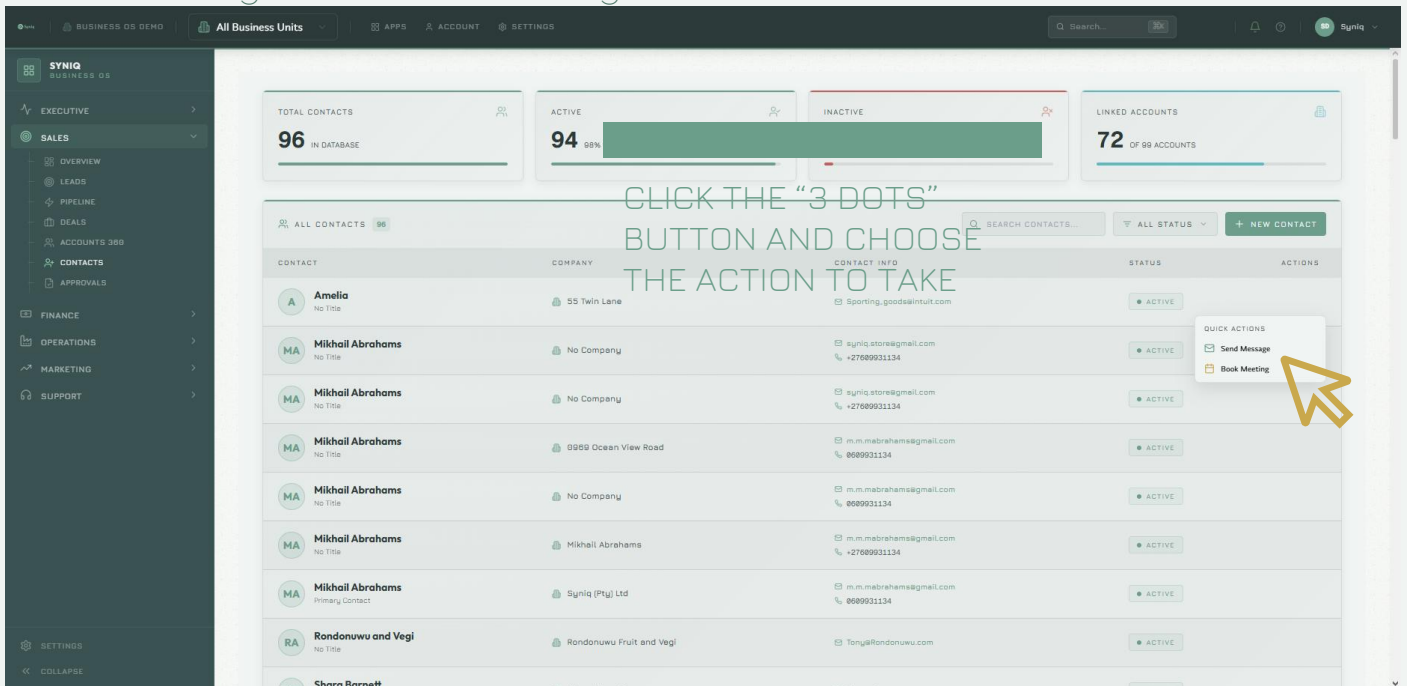


Figure 30: Message and Book Meeting with Contact