

Your CRM: a guide for the Lowry team.

Your everyday guide: finding what you need, keeping your jobs up to date, and using it on site from your phone. For engineers and sales at Lowry Lighting Solutions.

Prepared for
Lowry Lighting Solutions Ltd

Prepared by
Leadaline Ltd

Version
1.2, September 2026

Covers
The CRM from go live, 1 October 2026

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GETTING STARTED

Signing in for the first time.

The CRM lives at a web address, so there is nothing to install. It works in any up to date browser on a computer, and on your phone.

Your first sign in

- 1 Go to **lowry.leadaline.com**.
- 2 Sign in with your work email and the details we send you.
- 3 The CRM asks you to choose your own password, of at least 12 characters, before it shows anything else. Three random words work well. That password is yours alone. Leadaline never sees it.
- 4 A short welcome then shows you around. This guide is always in the menu under your name.

How a job moves

The stages

- **Enquiry:** someone has been in touch about a job.
- **Survey:** a site visit is being arranged or has happened.
- **Quoted:** a price has gone out.
- **Won or Lost:** the decision is made. A lost job records why.

How likely is it

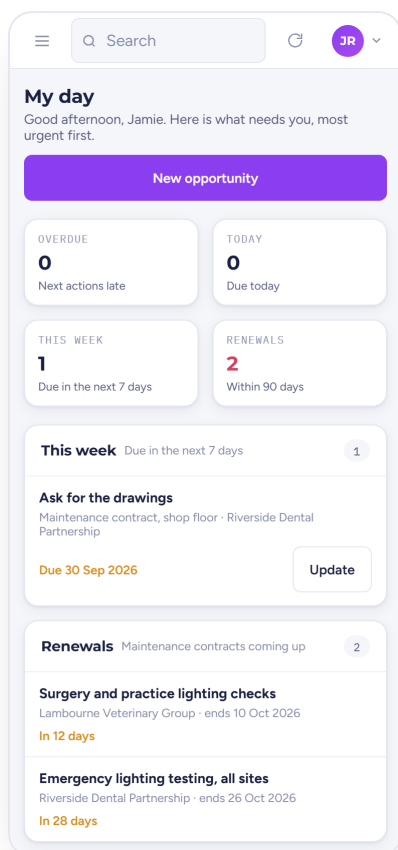
- **Long shot:** early, or one of several quoting.
- **Even chance:** a real job with a real budget.
- **Likely:** you are ahead.
- **Verbally agreed:** they have said yes, and the paperwork is to follow.

The one habit that matters. Every open job has a next action and a date. Keep yours current and everything else, from your dashboard to your figures, stays true.

ON YOUR PHONE

Built for site, not just the desk.

Put the CRM on your phone's home screen and it opens like an app, full screen, straight onto My day, with the same sign in and the same records. Everything in this guide works from your phone.



On an iPhone

- 1 Open lowry.leadaline.com in Safari and sign in.
- 2 Press the Share button, then "Add to Home Screen".

On Android

- 1 Open lowry.leadaline.com in Chrome and sign in.
- 2 Press the three dot menu, then "Install app" or "Add to home screen".

On site

- Search a customer's name or a project number from the box at the top.
- Tap any phone number or email address to call or write straight away.
- Open the customer to see their people, phone numbers and project folders.
- Tap the menu button, top left, to move between sections.
- Forms open from the bottom of the screen, with Save under your thumb.

The best use of it. In the van, straight after the visit or the call, press Update on My day while it is fresh.

MY DAY

What needs you today.

Your jobs that need something, most urgent first, so there is nothing to hunt for. It is the first screen on your phone, and in the menu on a computer.

Q Search customers, contacts, opportunities

🕒 Jamie Rothwell
Team member JR

My day
Good afternoon, Jamie. Here is what needs you, most urgent first.

New opportunity

OVERDUE
0
Next actions late

TODAY
0
Due today

THIS WEEK
1
Due in the next 7 days

RENEWALS
2
Within 90 days

This week Due in the next 7 days 1

Ask for the drawings
Maintenance contract, shop floor · Riverside Dental Partnership
Due 30 Sep 2026 Update

Renewals Maintenance contracts coming up 2

Surgery and practice lighting checks
Lambourne Veterinary Group · ends 10 Oct 2026 In 12 days

Emergency lighting testing, all sites
Riverside Dental Partnership · ends 26 Oct 2026 In 28 days

Gone quiet Nobody has touched these for 30 days or more 1

How to use it

- 1 Start at the top: overdue first, then today, then the rest of the week.
- 2 Press Update on a job. Say what happened if you like, then what is next and the date to do it by.
- 3 Tap a choice to save typing: Not done yet, keep it, a common next step, or Tomorrow, Next week and so on.
- 4 If the customer has decided, mark the job won or lost from the same box.

Good to know

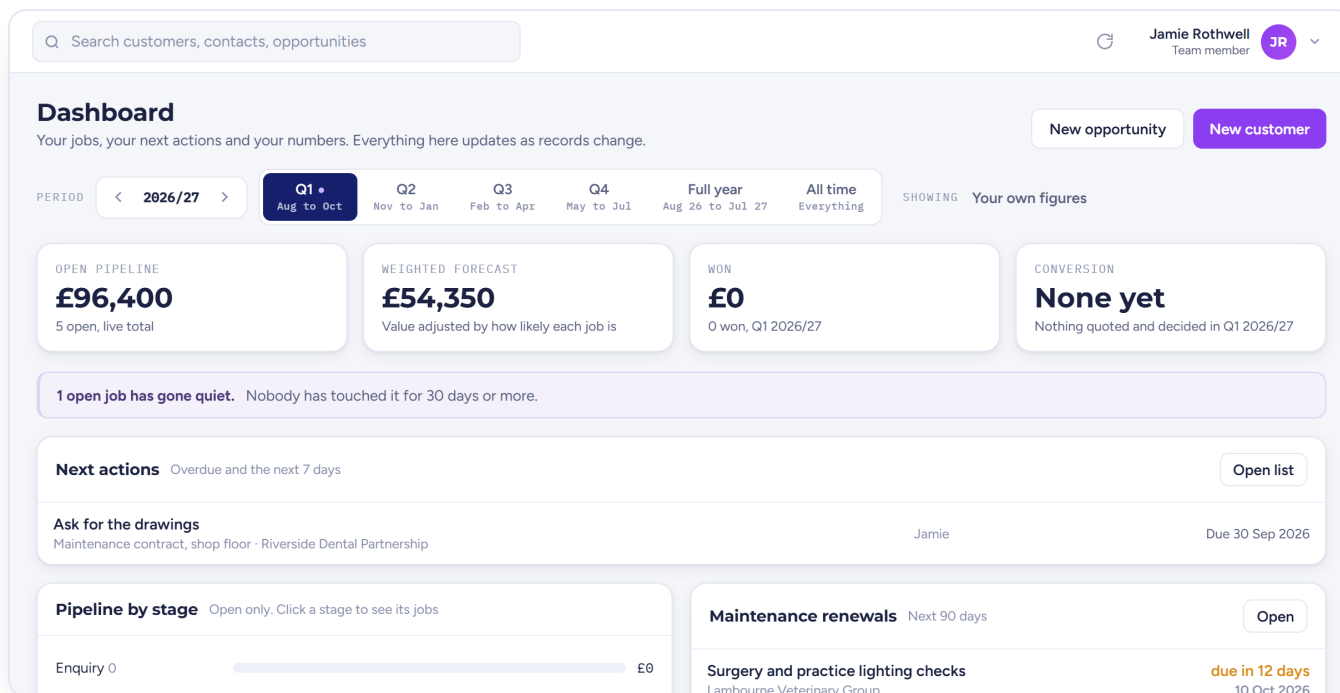
- It also lists your renewals coming up, your open jobs with no next action, and any past their close date.
- **Gone quiet** means nobody has touched one of your open jobs for 30 days. Worth a call.
- **Do it by** is the day the next step should be done, not the day you did the last one.

Two minutes each morning. Work down My day and your jobs, your dashboard and your figures all stay current.

YOUR DASHBOARD

Your work, and what is next.

The first screen on a computer. It shows your open jobs, what you have won, what you need to do next, and any maintenance contracts coming up for renewal.



How to use it

- 1 Start with Next actions: anything overdue first, then the coming week.
- 2 Choose a quarter, the full year or all time. Quarters follow Lowry's financial year, so Q1 is August to October.
- 3 Press a figure, such as Open pipeline or Won, to open the exact jobs behind it.

Good to know

- Your dashboard shows your own jobs and figures.
- Weighted forecast is the open value adjusted by how likely each job is. A Likely job counts at 75% of its value.
- Conversion is jobs won against jobs quoted.
- A red number in the menu means something needs attention.
- **Upgrade finder** lists your customers on an older control system, such as iLight, with no job open.

OPPORTUNITIES

Every job in play.

Every job, what it is worth, what stage it has reached and what happens next. It opens on live work: Enquiry, Survey and Quoted. You can open and update any job, not just your own.

Q Search customers, contacts, opportunities

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Jamie Rothwell
Team member

JR

▼

Opportunities

Live jobs, and what was won and lost. Tap a figure to list those jobs.

Board view

New opportunity

OPEN VALUE

£808,200

32 live jobs

WEIGHTED

£373,315

The open value, adjusted by how likely each job is

WON

£240,200

8 jobs, 2026/27 so far

LOST

£224,500

9 jobs, 2026/27 so far

Search title or reference

All owners

All project types

All sectors

Live jobs

Won and lost in 2026/27

CLOSING BETWEEN

dd/mm/yyyy

AND

dd/mm/yyyy

32 SHOWN

REF	OPPORTUNITY	CUSTOMER	TYPE	STAGE	NEXT ACTION	OWNER	VALUE	CLOSE	LAST EDITED	FOLD
P-08289	Lighting and controls refit, main hall	Fairhaven Primary Federation	Lighting and controls	QUOTED	Book the survey in Due 19 Oct 2026	Christian Powell	£76,000	29 Jan 2027	28 Sep 2026 Terry	Not linked
P-08283	Maintenance contract, car park	Albion Court Offices	Maintenance contract	SURVEY	Chase the decision Due 14 Oct 2026	Terry Booker	£3,900	26 Dec 2026	26 Sep 2026	Not linked
P-08271	Lighting and controls refit,	Brookmill	Lighting and	QUOTED	Chase the decision Due 14 Oct 2026	Dan	£80,500	09 Oct	26 Sep 2026	Not

How to use it

- 1 Search by title or project number, or filter by owner, project type, sector or stage.
- 2 Pick yourself under owner to see just your jobs.
- 3 Tap Open value, Won or Lost at the top to list exactly those jobs.
- 4 Tap any row to open the job.
- 5 Press Board view to see the stages side by side, and drag a card to move it on.

Good to know

- The list is ordered by most recently edited, so the work being touched is at the top.
- Owner and Last edited are different things: who the job belongs to, and who last changed it.
- Dragging a card asks before it changes anything.
- Won and Lost cover this financial year. Choose "Won and lost, all years" to go further back.

OPPORTUNITIES

Adding and updating a job.

Press New opportunity from My day, the dashboard, the opportunities list or a customer's page.

To say what is next on a job, press Update on it, or on My day. To change anything else, open it and press Edit.

What to fill in

- **Customer, account manager and stage** are always needed.
- While a job is open, it needs **what is next** and the date to **do it by**. This is the heart of it.
- Once it is Quoted or Won, it needs a **value**, excluding VAT, and both **control systems**.
- **How likely is it:** Long shot, Even chance, Likely or Verbally agreed.
- **Control systems:** the existing system and the proposed ones, picked from a list. Tick more than one proposed system for a hybrid.

Good to know

- The project number fills itself in.
- The title is optional. Without one, the project type or number stands in.
- Paste the job's **Dropbox folder link**, so anyone can get to the drawings and photos.
- If a needed detail is missing, the CRM tells you before it saves.
- When a job is lost, the CRM asks why: price, timing, budget or cancelled.

CUSTOMERS

Everything about a firm, on one page.

Every company you work with, its sector, its account manager and its address. Open one to see its people, jobs, folders and contracts together.

Q Search customers, contacts, opportunities

Jamie Rothwell
Team member JR

< All customers

Moorland Community Health

Moorland House, Hospital Road, Sheffield, S10 9ZZ

HEALTHCARE SHEFFIELD 0114 496 0948 ACCOUNT MANAGER: JAMIE ROTHWELL

Add contact

Edit

New opportunity

OPEN PIPELINE

£41,000

1 live opportunity

WON TO DATE

£92,500

6 projects

CONTACTS

1

People on record

MAINTENANCE

1

Active contracts

Contacts Roles and responsibilities

Fiona Grant

Head of Estates

Approves all works over ten thousand pounds

fiona.grant@example.com · 07700 900924

IN CAMPAIGNS

Project folders

Dropbox links from every project

No folder links yet. Add a Dropbox link on an opportunity and it appears here automatically.

Opportunities 9 total

REF	TITLE	TYPE	STAGE	OWNER	VALUE	CLOSE
P-08026	Ward corridor presence detection	Controls	SURVEY	Jamie Rothwell	£41,000	12 Dec 2026
P-08215	Service visit, ward block	Service visit	WON	Jamie Rothwell	£550	31 Jan 2026
P-08118	Controls upgrade, stairwells	Controls	WON	Jamie Rothwell	£8,500	23 Nov 2024
P-08110	LED lighting replacement, main hall	Lighting	LOST	Jamie Rothwell	£37,000	18 Oct 2024
P-08090	Service visit, shop floor	Service visit	LOST	Jamie Rothwell	£1,450	22 Jul 2024

How to use it

- 1 Search the list by name, town or postcode, or filter by sector or account manager.
- 2 Open a customer to see its contacts, open jobs, what has been won, and any maintenance contracts.
- 3 Add a contact or a new job straight from their page.

Good to know

- Sectors: Hospitality (including entertainment, theatres and museums), Retail, Office, Education, Healthcare and Industry (including logistics and transport).
- A customer can have as many contacts as you need.
- Project folders gathers every Dropbox link from that customer's jobs, which is handy before a site visit.

CONTACTS

The people you deal with.

Everyone at your customers, with their role, what they are responsible for, and how to reach them.

Q Search customers, contacts, opportunities

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Jamie Rothwell
Team member

JR

Contacts

Everyone you deal with, filtered by customer or sector, ready to export for a campaign.

New contact

Search name, role or email

All sectors

All customers

Everyone

36 SHOWN

NAME	CUSTOMER	ROLE	SCOPE	EMAIL	PHONE	CAMPAIGNS
Alan Jarvis	Willowbank Care Homes	Site Manager		alan.jarvis@example.com	07700 913130	INCLUDED
Alan Pemberton	The Assembly Rooms Theatre	Business Manager		alan.pemberton@example.com	07700 915634	INCLUDED
Alan Radcliffe	Saltmarsh Garden Centres	Facilities Manager		alan.radcliffe@example.com	07700 912191	EXCLUDED
Bethan Ingram	Severn Valley Castings	Facilities Manager		bethan.ingram@example.com	07700 917199	INCLUDED
Daniel Okafor	St Aldhelm Academy Trust	Business Manager	Holds the estates budget	daniel.okafor@example.com	07700 900439	INCLUDED
Dionne Norbury	Lambourne Veterinary Group	Building Services Manager		dionne.norbury@example.com	07700 915008	EXCLUDED
Farida Bramley	Ardwick House Chambers	Head of Property		farida.bramley@example.com	07700 912504	INCLUDED
Fiona Grant	Moorland Community Health	Head of Estates	Approves all works over ten thousand pounds	fiona.grant@example.com	07700 900924	INCLUDED
Gareth Lloyd	Albion Court Offices	Building Services Manager	Lighting, heating and controls	gareth.lloyd@example.com	07700 900266	INCLUDED

How to use it

- 1 Search by name, role or email, or filter by sector or customer.
- 2 Tap a contact to see their details and change them.
- 3 Press New contact to add someone you have met.

Good to know

- Scope records what someone is responsible for, such as "signs off capital works". It tells you who to speak to.
- Each person's choice about marketing emails is kept on their record. Keep it as they asked.

MAINTENANCE CONTRACTS

Contracts, visits and renewals.

Each contract has its own MC number, separate from project numbers, and the CRM watches its end date.

Q Search customers, contacts, opportunities

🕒 Jamie Rothwell
Team member JR

Maintenance contracts

Contracts you hold, when each one renews, and which ones have gone past their date.

ACTIVE CONTRACTS
12
Currently held

ANNUAL VALUE
£47,500
Across active contracts

DUE SOON
6
Within 90 days

OVERDUE
1
End date has passed

1 contract has passed the renewal date. They stay flagged here and in the sidebar until they are renewed, the date is moved, or the contract is set to Ended.

AllActiveDue soonOverdue

12 SHOWN

REF	CONTRACT	VISITS A YEAR	VALUE	ENDS	STATUS
MC-0006	Warehouse lighting service Marchwood Logistics	2	£2,600	19 Sep 2026 9 days overdue Renew	ACTIVE

How to use it

- 1 Filter by All, Active, Due soon or Overdue.
- 2 Open a contract to see its customer, dates, value, and visits a year.
- 3 When a contract renews, press Renew. It rolls on for the same length of term, starting the day after the old one ended. Undo puts it back.

Good to know

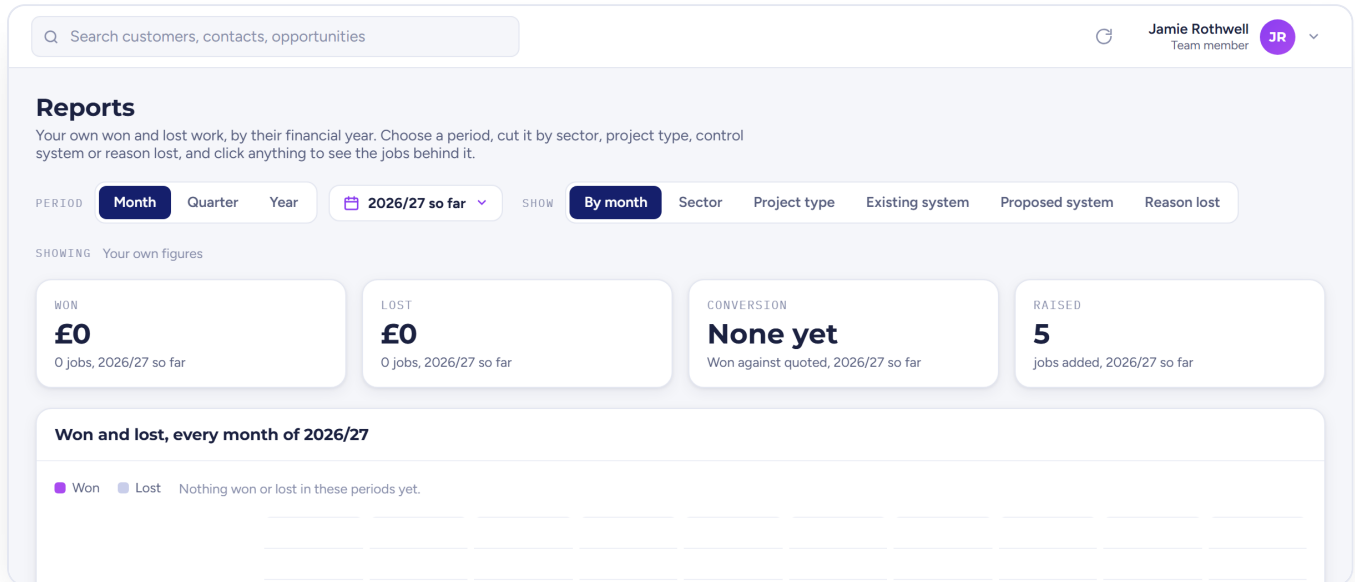
- 90 days before a contract ends it turns amber and appears on the dashboard and on My day, for whoever looks after it.
- Once the date passes it turns red, shows a count beside Maintenance in the menu, and stays flagged until it is renewed, the date is moved, or it is set to Ended.
- The warnings show on screen. They are not emailed to anyone.

10

YOUR FIGURES

What you have won and lost.

Reports shows your own jobs by month, quarter or year, always on Lowry's financial year from August to July.



How to use it

- 1 Choose Month, Quarter or Year.
- 2 Press the period button to pick a year, then a month or quarter, or type any two dates.
- 3 Under Show, cut it by sector, project type, existing or proposed control system, or reason lost.
- 4 Tap a column on the chart or a row in the table to see the jobs behind it.

Good to know

- Underneath, each period is set against the same period last year, like for like.
- The table shows the months so far and the next one. Press "Show the rest" for the whole year.
- Reason lost is worth a look: it shows why your jobs slip away.

SEARCH, HISTORY AND UNDO

Find anything, and change your mind.

The search box at the top of every screen looks across customers, contacts, jobs and contracts at once.

Q Search customers, contacts, opportunities

🕒

Jamie Rothwell
Team member

JR

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Results for “hotel”

29 records across the whole system.

Clear

CUSTOMERS

2

companies

CONTACTS

3

people

OPPORTUNITIES

22

£30,100 open, £237,300 won

CONTRACTS

2

maintenance agreements

Customers 2

CUSTOMER	SECTOR	ACCOUNT MANAGER	TOWN
Harbourside Hotel Collection	Hospitality	Dan Maskell	Liverpool
Castlegate Hotels	Hospitality	Terry Booker	Carlisle

Opportunities 22

REF	OPPORTUNITY	CUSTOMER	STAGE	OWNER	VALUE	CLOSE
P-08280	Controls upgrade, main hall	Castlegate Hotels	QUOTED	Terry Booker	£20,500	06 Dec 2026
P-08028	Annual controls maintenance, all hotels	Harbourside Hotel Collection	QUOTED	Dan Maskell	£9,600	18 Oct 2026
P-08269	Maintenance contract, north wing	Harbourside Hotel Collection	LOST	Dan Maskell	£2,700	27 Sep 2026

Search

Start typing a name, a project number, a town or a postcode. Pick a result, or press Enter to see every match on one page.

History

Every job keeps a record of what changed, who changed it and when. Contracts show their recent history too.

Undo

After a change, press Undo in the message at the bottom of the screen. It is also in the menu under your name, and Ctrl+Z works on a computer.

Got it wrong?

Change the stage or the details, or press Undo. Nothing is lost, and the history shows what happened.

HELP, AND A QUICK REFERENCE

Asking for help, and changes.

Something not working?

Email hello@leadaline.com at any time, with what you were doing and a screenshot if you can. We reply within 48 hours.

Want something changed?

A new option on a list, a field renamed, or an idea to save time: tell your admin, or email hello@leadaline.com.

Looked after by your admins

Some things, such as importing records or changing the lists, are looked after by your admins.

Your records are safe

They are stored in London, encrypted, and backed up every day. Passwords are at least 12 characters, and you can turn on two step sign in under Settings. On a shared computer, untick "Keep me signed in" and you are signed out after 30 minutes unused.

Quick reference

See what I need to do today	My day
Add a new enquiry	New opportunity, on any main screen
Update a job after a visit	My day or the job, Update
Move a job to its next stage	Open the job and change the stage, or drag it on the board
Call a customer	Search their name, open the customer, tap the number
Get to a job's drawings and photos	Open the job, then its Dropbox folder link
Renew a maintenance contract	Maintenance, open the contract, Renew
See why my jobs were lost this quarter	Reports, Quarter, Reason lost
Undo a mistake	Undo on the message, the menu, or Ctrl+Z
Open this guide again	The menu under your name, User guide