

# Tabs

- Lead Header
- Activity

# Lead Header

<u>Client</u>	Konnect Demo	<u>Organization</u>	Manufacturing Discrete
Search Key			
<b>Name</b>			
Description			
<input checked="" type="checkbox"/> Active			
Phone		2nd Phone	
EMail Address		Fax	
Address			
Customer Name		<b>Lead Time</b>	
<u>Position</u>		Customer Location	
<u>Campaign</u>		<u>Sales Representative</u>	
Lead Source		Lead Source Description	
Lead Status		Lead Status Description	
Comments			

## Critical Fields

- 1.Name : This field is used to enter the new customer contact person name
- 2.Lead Date : This Field is used to capture the date of the Lead
- 3.Phone : This Field is used to enter the Customer Phone Number
- 4.2nd Phone : This Field is used to Capture the Customer Phone Number 2
- 5.Email address : This Field is used to Capture the Customer Email Address
- 6.Fax : This Field is used to capture Customer Fax Number
- 7.Customer name : This field is used to enter the new customer Name
- 8.Customer location : This Field is used to capture Customer Location
- 9.Lead source : This field is used to capture the source for the enquiry

9.1 Cold call : By a cold call is the source for this enquiry

9.2 Conference : Company Conference is the source for this enquiry

9.3 Customer portal : Customer portal is the source for this enquiry

9.4 Dealer : By a Dealer is the source for this enquiry

9.5 Email : Company Email as a source for this enquiry

9.6 Employee : By a Company Employee is the source for this enquiry

9.7 Existing customer : Existing Customer is the source for this enquiry

9.8 Magazine : Company in Magazine is the Source for this enquiry

9.9 Partner : By partner is the source for this enquiry

9.10 Trade show : By Company trade show is the source for this enquiry

9.11 Web site : Company Website is the source for this enquiry

9.12 Word of mouth : By Word of Mouth is the source for this enquiry

## 10. Lead status

10.1 Cold - Cold is the current status of the lead in the Entire cycle

10.2 Converted - This status defines that the lead is converted in the cycle

10.3 Expired - This status defines that the lead Time expired

10.4 Follow up - This status defines the lead is still in follow up

10.5 Hot - This status defines the lead is in a Converting Stage

10.6 New - This status defines the lead is new

10.6 Recycled - This status defines that the lead is Reworked

10.7 Warm - This status defines a normal lead stage in the entire cycle

10.8 Working - This status defines the lead is in IN progress

11. Lead Source description - Short Description of the lead source

12. Lead status Description - Short Description of the lead Status

13. Sales Representative : This field is used for sales rep updating purpose, the record will display from employee master when sales rep field is checked

## **Critical & onetime setup fields**

1. Organization: This field is used to select the organization name

## **Non-Critical Fields**

1. Campaign

2. Comments

## **Zoom condition's**

## **Customization**

# Activity

The screenshot shows a web form for creating an activity. It includes several input fields and checkboxes. The 'Client' field is set to 'Konnect Demo'. The 'User/Contact' field is set to 'zuvansky12'. The 'Activity Type' field is a dropdown menu. The 'Description' field is a large text area. The 'Sales Representative' field is a dropdown menu. The 'Sales Opportunity' field is a dropdown menu. The 'Comments' field is a large text area. The 'Start Date' field is set to '08/06/2020' and '11:15:57 AM'. The 'End Date' field is empty. There are two checkboxes at the bottom: 'Complete' and 'Follow Up'.

Client	Konnect Demo	Organization	
User/Contact	zuvansky12		
Activity Type			
Description			
Sales Representative			
Sales Opportunity			
Comments			
Start Date	08/06/2020 11:15:57 AM	End Date	
<input type="checkbox"/> Complete		<input type="checkbox"/> Follow Up	

## Critical Fields

1. Activity Type - It defines the Activity type in Follow ups

1.1 Email - It defines the Activity is happened through Email

1.2 Meeting - It defines the Activity is happened in meeting

1.3 Phone call - It defines the Activity is happened through call

1.4 Task - It defines the Activity is happened through a task

2. Description - short Description of the Activity.

3..Sales Representative :This field used for sales rep updating purpose ,the regard will display from employee master when sales rep field is checked

4.Sales opportunity : Sales opportunity document details updating purpose

5.Start Date :Lead start date

6.End date :Lead end date

7. Follow up - check box is enable Below fields are available

7.1 Follow Up Date

7.2 Remind Before(Minutes)

## **Critical & onetime setup fields**

## **Non-Critical Fields**

## **Zoom condition's**

## **Customization**

Convert Lead to BP and Opportunity

To click process button

## Convert Lead

### Convert Lead to BP and Opportunity

Convert Lead into a Business Partner and (optional) Sales Opportunity

☒ Create Opportunity

Expected Close Date  

Description

Sales Stage  ▼

Opportunity Amount  

Currency  ▼

Sales Representative  ▼

☐ Customer

☐ Run as Job

Saved Parameters  Saved Parameters ▼



 OK

 Cancel