

Tabs

- Lead Header
- Activity

Lead Header

The screenshot shows a 'Lead Header' form with the following fields and controls:

- Client:** Dropdown menu with 'Konnect Demo' selected.
- Organization:** Dropdown menu with 'Manufacturing Discrete' selected.
- Search Key:** Text input field.
- Name:** Text input field.
- Description:** Text input field.
- Active:** Checked checkbox.
- Phone:** Text input field.
- 2nd Phone:** Text input field.
- Email Address:** Text input field.
- Fax:** Text input field.
- Address:** Text input field with a menu icon.
- Lead Time:** Text input field with a calendar icon.
- Customer Name:** Text input field.
- Customer Location:** Text input field with a menu icon.
- Position:** Dropdown menu.
- Campaign:** Dropdown menu.
- Sales Representative:** Dropdown menu.
- Lead Source:** Dropdown menu.
- Lead Source Description:** Text input field with a slash icon.
- Lead Status:** Dropdown menu.
- Lead Status Description:** Text input field with a slash icon.
- Comments:** Text input field with a slash icon.

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 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 form for creating an activity. The fields are as follows:

- Client:** Konnect Demo
- Organization:** F
- User/Contact:** zuvansky12
- Activity Type:** (dropdown menu)
- Description:** (text input field)
- Sales Representative:** (dropdown menu)
- Sales Opportunity:** (dropdown menu)
- Comments:** (text area)
- Start Date:** 08/06/2020 11:15:57 AM
- End Date:** (calendar icon)
- Complete:**
- 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 ▼



 OK

 Cancel