Lead Expired

Introduction

Introduction

This window is used to update the details of Expired Enquiry details ,

Business Example

If the Lead Time Expires the the lead will not appear in the Lead Window it will be available on the Lead Expire window to update and for Follow ups.

Tabs

Lead Header

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 regard 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

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

☑ CreateOpportunity

Expected Close Date	▢ 🗓
Description	▢
Sales Stage	▢ ▼
Opportunity Amount	▢ 🔢
Currency	▢ ▼
Sales Representative	▢ ▼
	☐ Customer

☐ Run as Job

Saved Parameters [Saved Parameters ▼] 💾 🗑️   ✔ OK   ✖ Cancel

Validations & Actions

Validation

Save

1.System will check the all mandatory fields

Delete

1.System will delete the order and its history details