

# 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 list icon.
- Lead Time:** Text input field with a calendar icon.
- Customer Name:** Text input field.
- Customer Location:** Text input field with a list 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 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**

---

Revision #2

Created Wed, Oct 14, 2020 7:06 PM

Updated Wed, Oct 14, 2020 8:01 PM