

Process

- Order Process

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Convert Lead

This process is used to Convert Lead into a Business Partner and (optional) Sales Opportunity.

The screenshot displays the KONECT ERP interface. In the background, a lead record for 'Premkumar' is visible, showing details such as Client (Konekt Demo), Search Key (premkuma), Name (Premkumar), Description (Samicron technologies), Phone Number (1234567898), Email ID (accounts@samicron.com), and Location (HSR Layout, Bengaluru, Karnataka). The 'Convert Lead' dialog box is open in the foreground, titled 'Convert Lead to BP and Opportunity'. It contains the following fields and options:

- User/Contact:** Premkumar (dropdown menu)
- Create Opportunity:** ☒ (checkbox)
- Expected Close Date:** (calendar icon)
- Description:** (text input field)
- Sales Stage:** (dropdown menu, highlighted with a red border)
- Opportunity Amount:** (text input field)
- Currency:** (dropdown menu)
- Sales Representative:** (dropdown menu)
- Business Partner Group:** (dropdown menu)
- Business Partner Type:** (dropdown menu)
- Customer:** ☐ (checkbox)
- Run as Job:** ☐ (checkbox)
- Saved Parameters:** (dropdown menu)
- OK** and **Cancel** buttons at the bottom right.

1. User/Contact: We can select the user /contact details
2. Create Opportunity : If check box is selected it will Create a new Sales Opportunity when converting a lead.
2. Expected Close Date: To select the Expected Close Date
3. Description :To enter the description details
4. Sales stage: This master details is used to select the type of the document that you are going to process (EX:Lead Quotation, Estimation,etc..)
5. Opportunity Amount: To enter the Opportunity amount details
6. Currency: To choose the type of currency data, use these master details.

7. Sales Representative: Used to select the Sales Representative
8. Business partner Group: Used to select the Business partner group
9. Business partner type: Used to select the Business partner type