

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 shows the 'Convert Lead' dialog box in the KONECT ERP system. The dialog is titled 'Convert Lead to BP and Opportunity' and contains the following fields and options:

- User/Contact:** A dropdown menu with 'Premkumar' selected.
- Create Opportunity:** A checked checkbox.
- Expected Close Date:** A date picker field.
- Description:** A text input field.
- Sales Stage:** A dropdown menu with a red border.
- Opportunity Amount:** A text input field with a currency icon.
- Currency:** A dropdown menu.
- Sales Representative:** A dropdown menu.
- Business Partner Group:** A dropdown menu.
- Business Partner Type:** A dropdown menu.
- Customer:** An unchecked checkbox.
- Run as Job:** An unchecked checkbox.
- Saved Parameters:** A dropdown menu with a save icon.
- OK** and **Cancel** buttons at the bottom right.

The background shows the 'Lead' record for 'Premkumar' with 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).

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