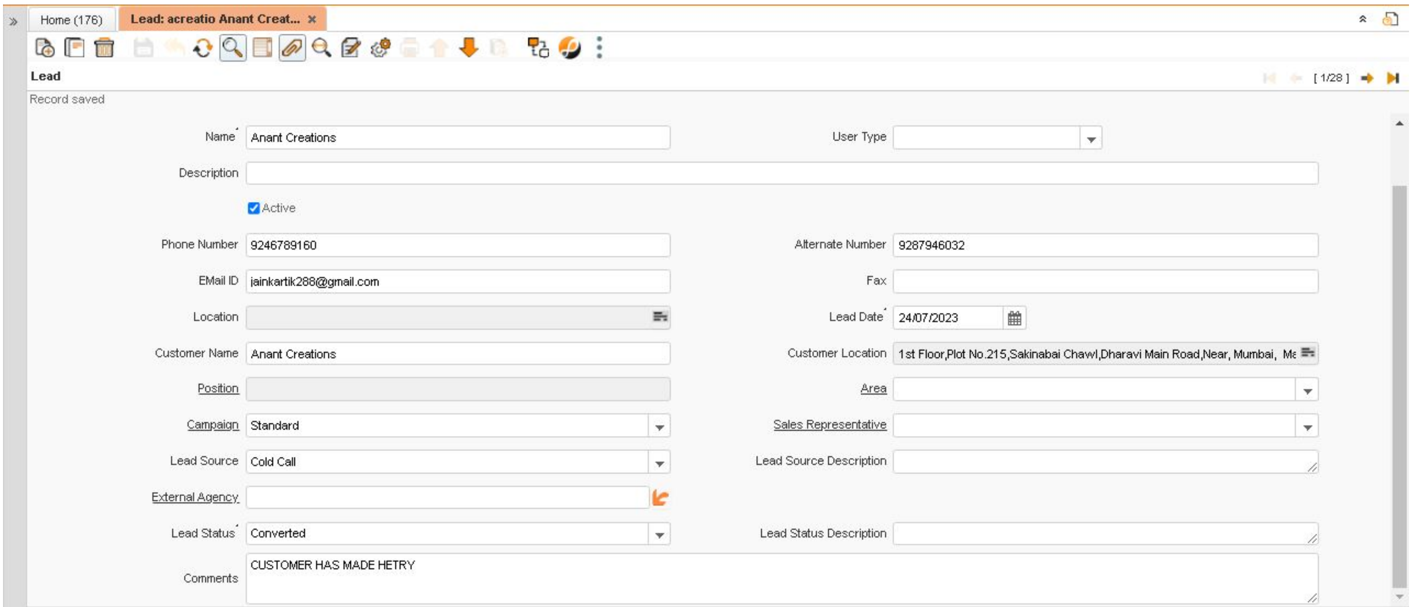
Tabs

- Lead Header
- Activity

Lead Header



Critical Fields

1.Name: This field used to enter the new customer contact person name

2.Lead date: This field is used to mention the date of the lead generated

3.Lead Status

3.1 Cold

3.2 Converted

3.3 Expired

3.4 Follow up

3.5 Hot

3.6 New

3.6 Recycled

3.7 Warm

3.8 Working

Critical & onetime setup fields

1.Organization:This Field is used to select the organization name

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Non-Critical Fields

1.User Type: This field is used to select the User type which is mentioned in employee contact user.

2.Description: Used to describe specifics about a Lead document or any other note, information, or data, for example.

3.Phone Number: This field is used to mention the Phone number of the lead

4.Alternate Number: This field is used to mention another Phone number of the leadMail ID : This field is used to mention the email address of the lead

5.Email ID: Email address details.

6.Fax: This field is used to mention the fax number of the employee

7.Location: This field is used to mention the Lead location

8.Customer name: This field is used to mention the customer name

9.Customer location: This field is used to mention the Customer Location.

10.Campaige: Marketing campaign.

11.Sales Representative: This field used for sales rep updating purpose ,the regard will display from employee master when sales rep field is checked.

12. Lead Source

    12.1. Cold call: It defines that the Lead is generated through a cold call
    12.2. Conference : It defines that the Lead is generated through a conference

12.3. Customer portal : It defines that the Lead is generated through a customer portal

12.4. Dealer : It defines that the Lead is generated through a Dealer

12.5. Email : It defines that the Lead is generated through a Email

12.6. Employee :It defines that the Lead is generated through a Employee

12.7. Existing customer It defines that the Lead is generated through a Existing Customer

12.8. Magazine : It defines that the Lead is generated through a Magazine

12.9. Partner : It defines that the Lead is generated through a partner

12.10. Trade show : It defines that the Lead is generated through a Trade show

12.11. Web site: Website details

12.12. Word of mouth: If sales representative had face-to-face conversation only with any representative of Lead

13. Lead Source description: Used to describe specifics about a Lead Source or any other note, information, or data, for example.

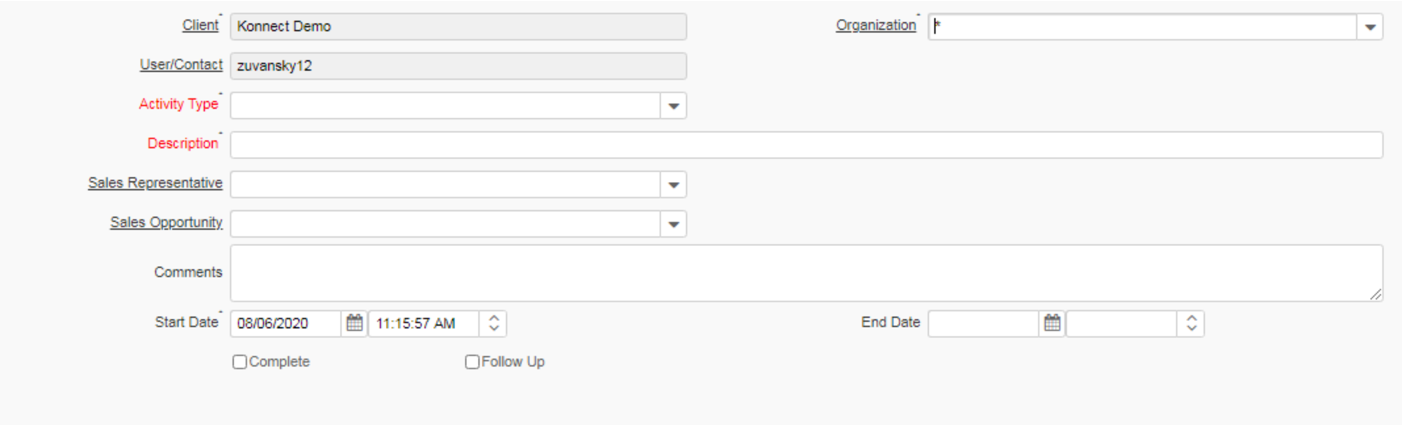
14. Lead Status description: Used to describe specifics about a Lead Status or any other note, information, or data, for example.

15. External Agency : It is used to select the existing business partner name.

Zoom condition’s

Customization

Activity



Critical Fields

1.Activity Type

- 1.1 Email
- 1.2 Email Campaign
- 1.3 Meeting
- 1.4 Online Meeting
- 1.5 Phone call
- 1.6 Social Media
- 1.7 Task
- 1.8 Whatsapp
- 1.9 Whatsapp Campaign

2.Description : Optional short description of the record

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