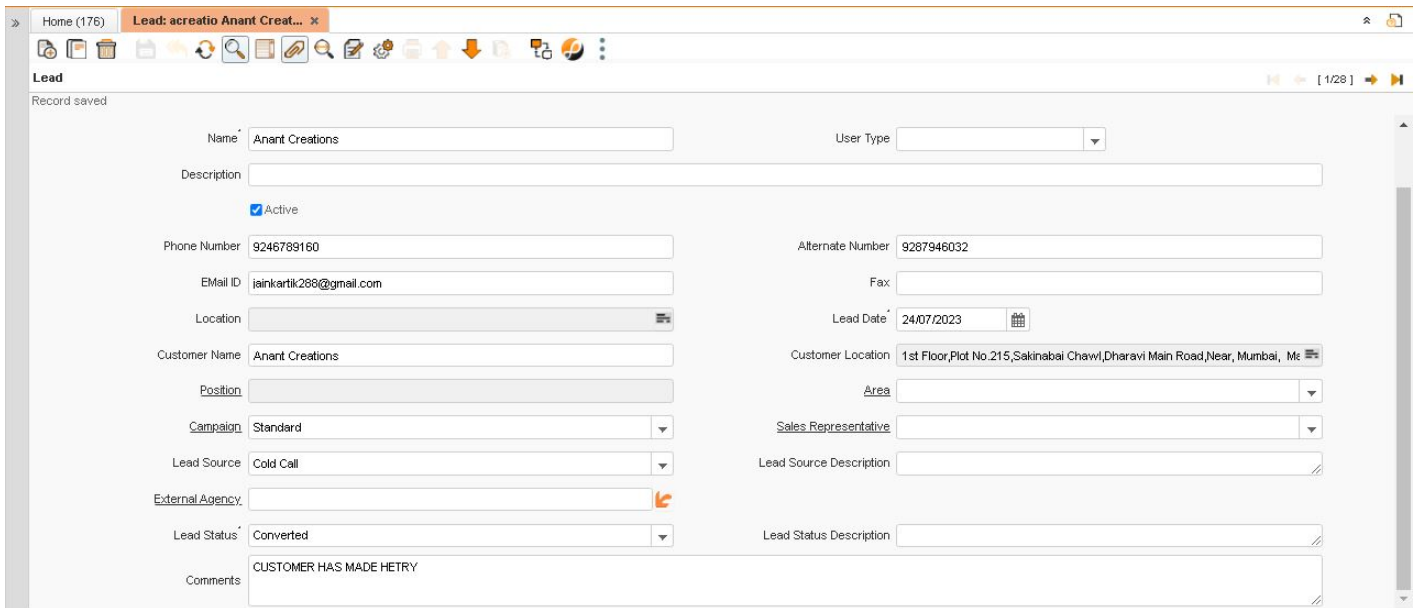


Tabs

- Lead Header
- Activity

Lead Header



The screenshot shows a web application interface for a CRM system. The browser tab is titled 'Lead: acreation Anant Creat...'. The page has a top navigation bar with 'Home (176)' and a breadcrumb trail. Below the navigation bar is a toolbar with various icons for actions like save, delete, and search. The main content area is titled 'Lead' and shows a 'Record saved' message. The form is divided into two columns. The left column contains fields for Name (Anant Creations), Description, Active checkbox, Phone Number (9246789160), Email ID (jainkartik288@gmail.com), Location, Customer Name (Anant Creations), Position, Campaign (Standard), Lead Source (Cold Call), External Agency, Lead Status (Converted), and Comments (CUSTOMER HAS MADE HETRY). The right column contains fields for User Type, Alternate Number (9287946032), Fax, Lead Date (24/07/2023), Customer Location (1st Floor, Plot No 215, Sakinabai Chawl, Dharavi Main Road, Near, Mumbai, M), Area, Sales Representative, Lead Source Description, and Lead Status Description.

Lead

Record saved

Name: Anant Creations

User Type: [Dropdown]

Description: [Text Field]

☒ Active

Phone Number: 9246789160

Alternate Number: 9287946032

Email ID: jainkartik288@gmail.com

Fax: [Text Field]

Location: [Text Field]

Lead Date: 24/07/2023

Customer Name: Anant Creations

Customer Location: 1st Floor, Plot No 215, Sakinabai Chawl, Dharavi Main Road, Near, Mumbai, M

Position: [Text Field]

Area: [Text Field]

Campaign: Standard

Sales Representative: [Text Field]

Lead Source: Cold Call

Lead Source Description: [Text Field]

External Agency: [Text Field]

Lead Status: Converted

Lead Status Description: [Text Field]

Comments: CUSTOMER HAS MADE HETRY

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

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 lead
Mail 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.Campaign: 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

The screenshot displays a web form for creating or editing an activity record. The form is organized into several sections. At the top, there are fields for 'Client' (set to 'Konnect Demo') and 'Organization' (with a dropdown arrow). Below these are 'User/Contact' (set to 'zuvansky12') and 'Activity Type' (a dropdown menu). A 'Description' field is a large text area. Further down are 'Sales Representative' and 'Sales Opportunity' (both dropdown menus). A 'Comments' field is a large text area with a small icon in the bottom right corner. At the bottom, there are 'Start Date' and 'End Date' fields, both with calendar icons. The 'Start Date' is set to '08/06/2020' and '11:15:57 AM'. Below the date fields are two checkboxes: 'Complete' and 'Follow Up'.

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 is used for sales rep updating purpose, the record 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