

# Tabs

- Lead Header
- Activity

# Lead Header

Home (176) | Lead: acreation Anant Creat... | [ 1/28 ]

Record saved

Name: Anant Creations | User Type: [ ]

Description: [ ]

Active

Phone Number: 9246789160 | Alternate Number: 9287946032

Email ID: jainkartik28@gmail.com | Fax: [ ]

Location: [ ] | 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: [ ] | Area: [ ]

Campaign: Standard | Sales Representative: [ ]

Lead Source: Cold Call | Lead Source Description: [ ]

External Agency: [ ] | Lead Status: Converted | Lead Status Description: [ ]

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
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## **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 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.

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## **Zoom condition's**

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## **Customization**

# Activity

Client: Konnect Demo Organization: F

User/Contact: zuvansky12

Activity Type: [dropdown]

Description: [text area]

Sales Representative: [dropdown]

Sales Opportunity: [dropdown]

Comments: [text area]

Start Date: 08/06/2020 11:15:57 AM End Date: [calendar icon]

Complete  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)

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## **Critical & onetime setup fields**

## **Non-Critical Fields**

## **Zoom condition's**

## **Customization**