

# Lead

- Introduction
- Tabs
  - Lead Header
  - Activity
- Document Actions
  - Validation
- Process
  - Order Process
- Video
  - Video
- Preceding and Succeeding Window
  - Lead Connected Window
- Form and Process
  - Convert Lead

# Introduction

## **Introduction**

Lead window is used to update details of New Enquiries

---

## **Business Example**

Customers are considered leads if they have inquired about or are interested in purchasing something.

# Tabs

# Lead Header

**Lead**

Record saved

Name: Anant Creations User Type: [Dropdown]

Description: [Text Field]

☒ Active

Phone Number: 9246789160 Alternate Number: 9287946032

Email ID: jainkartik268@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, Mg

Position: [Text Field] Area: [Dropdown]

Campaign: Standard Sales Representative: [Dropdown]

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**

Tabs

# Activity

Client	Konnect Demo	Organization	
User/Contact	zuvansky12		
Activity Type			
Description			
Sales Representative			
Sales Opportunity			
Comments			
Start Date	08/06/2020 11:15:57 AM	End Date	
<input type="checkbox"/> Complete		<input type="checkbox"/> 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 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**



# Document Actions

# Validation

## **Save**

1.System will check the all mandatory fields

---

## **Delete**

1.System will delete the order and its history details

# Process

# Order Process

## Convert Lead

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

The screenshot displays the KONECT ERP interface. On the left, a search bar shows 'employee' and a list of leads is visible. The main window is titled 'Convert Lead' and contains the following fields and options:

- User/Contact:** A dropdown menu with 'Premkumar' selected.
- Create Opportunity:** A checked checkbox.
- Expected Close Date:** A text field with a calendar icon.
- Description:** A text field.
- Sales Stage:** A dropdown menu.
- Opportunity Amount:** A text 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.
- Buttons:** 'OK' and 'Cancel' buttons.

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

# Video

Video

# Video

# Preceding and Succeeding Window



Preceding and Succeeding Window

# Lead Connected Window

## Preceding Window

---

## Succeeding Window

Lead (Expired)

Sales Opportunity :- Sales Opportunity

Customer :- Customer

# Form and Process

# Convert Lead

Home (58)

Summary

Convert Lead x

⌵

📄

**Convert Lead to BP and Opportunity**  
Convert Lead into a Business Partner and (optional) Sales Opportunity

User/Contact

▼

☒ Create Opportunity

Expected Close Date

📅

Description

Sales Stage

▼

Opportunity Amount

💰

Currency

▼

Sales Representative

▼

Business Partner Group

▼

Business Partner Type

▼

☐ Customer

☐ Run as Job

Saved Parameters

▼

💾

🗑️

✓ OK

✗ Cancel

## Parameters :

1. User/contact : Used to select the Default document create user name.
2. Expected Close Date : Here we can give the expected lead close date
3. Description : Used to give description details.
4. Sales Stage : Used to select the sales stage for the lead.
5. Opportunity Amount : For mention the Opportunity amount
6. Currency : Used to mention the currency type for that conversion

7. Sales Representative : Used to mention the sales rep name
8. Business Partner Group : the group name is used for select the BP group for newly generated documents.
9. Business partner Type : Types also we can select while run the process
10. Create Opportunity : If we want to generate the opportunity for the lead the we need to select.
11. Customer : If this lead is from existing customer means we can select this.

## **Process use :**

By Using this process we can convert the lead from lead to customer , and also we can create the Sales Opportunity too.