

# 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

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## Business Example

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

# Tabs

# Lead Header

Home (176) | Lead: acreation Anant Creat... x

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: [Dropdown] | Lead Date: 24/07/2023

Customer Name: Anant Creations | Customer Location: 1st Floor, Plot No. 215, Sakinabai Chawl, Dharavi Main Road, Near, Mumbai, Me

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

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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**

Tabs

# Activity

The screenshot displays a form for creating or editing an activity record. The fields are as follows:

- Client:** A text input field containing "Konnect Demo".
- Organization:** A dropdown menu with a search icon and a downward arrow.
- User/Contact:** A text input field containing "zuvansky12".
- Activity Type:** A dropdown menu.
- Description:** A large text area for entering a description.
- Sales Representative:** A dropdown menu.
- Sales Opportunity:** A dropdown menu.
- Comments:** A large text area for adding comments.
- Start Date:** A date and time picker showing "08/06/2020" and "11:15:57 AM".
- End Date:** A date and time picker.
- Complete:** A checkbox labeled "Complete".
- Follow Up:** A checkbox labeled "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 purposes, the record will display from employee master when the 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**

# Document Actions

# Validation

## **Save**

1. System will check the all mandatory fields

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## **Delete**

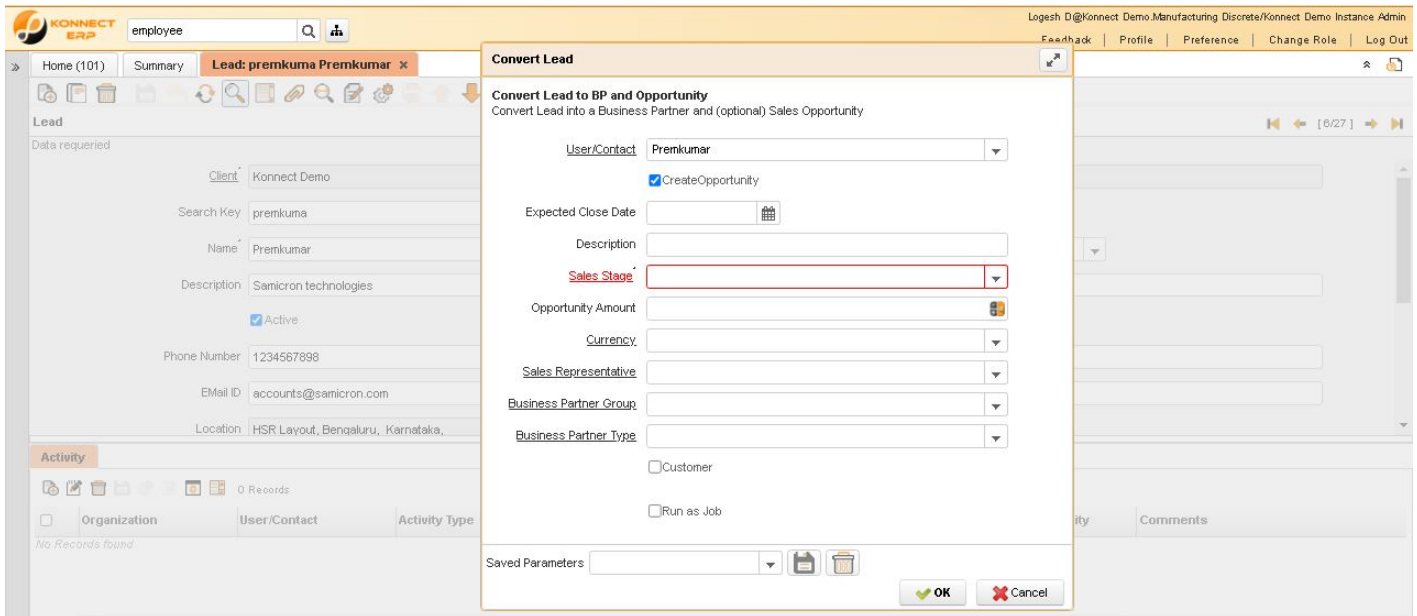
1. System will delete the order and its history details

# Process

# Order Process

## Convert Lead

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



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

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## Succeeding Window

Lead (Expired)

Sales Opportunity :- [Sales Opportunity](#)

Customer :- [Customer](#)

# Form and Process


# Convert Lead

## 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   

## 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.