Lead

Introduction

Introduction

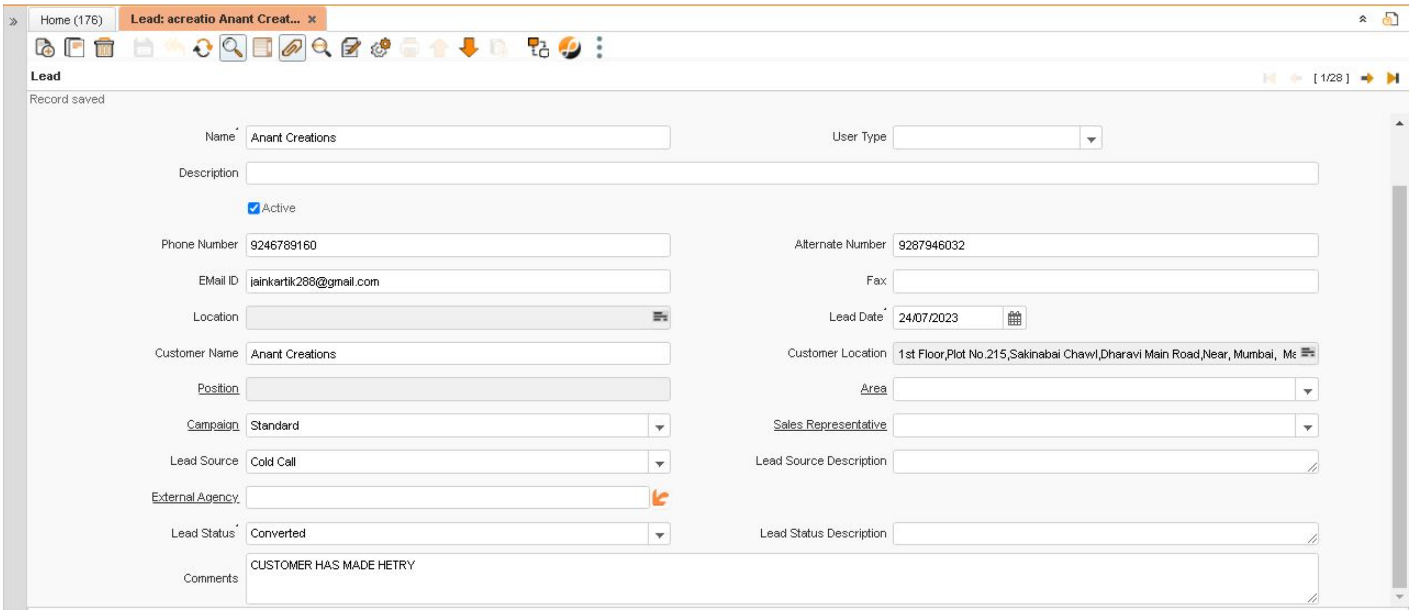
Lead window is used to update details of New Enquiries

Business Example

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

Tabs

Lead Header



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

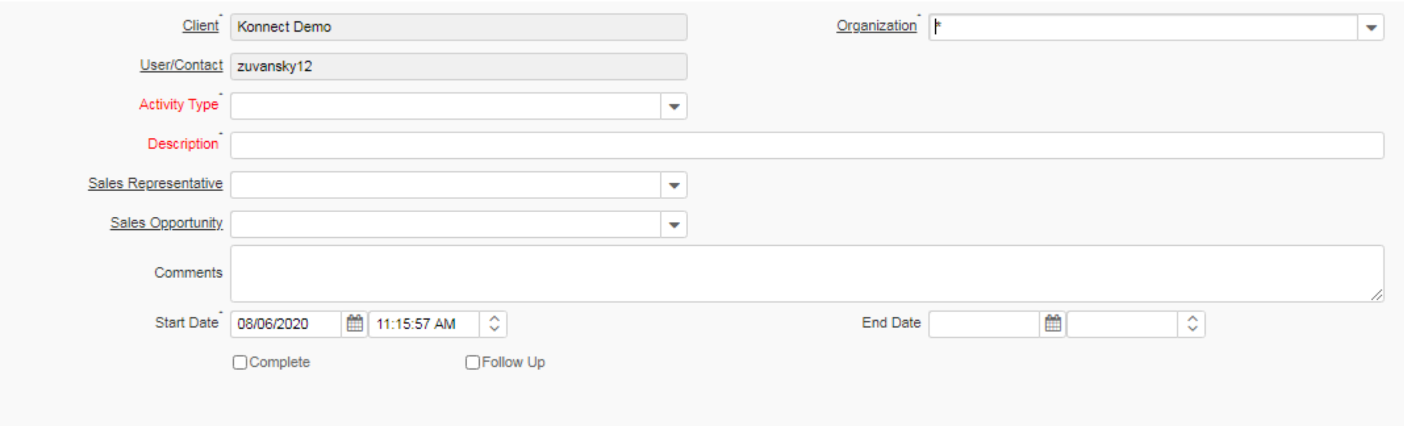
13. Lead Source description: Used to describe specifics about a Lead Source or any other note, information, or data, for example.
14. Lead Status description: Used to describe specifics about a Lead Status or any other note, information, or data, for example.
15. External Agency : It is used to select the existing business partner name.

Zoom condition’s

Customization

Tabs

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

Document Actions

Validation

Save

1.System will check the all mandatory fields

Delete

1.System will delete the order and its history details

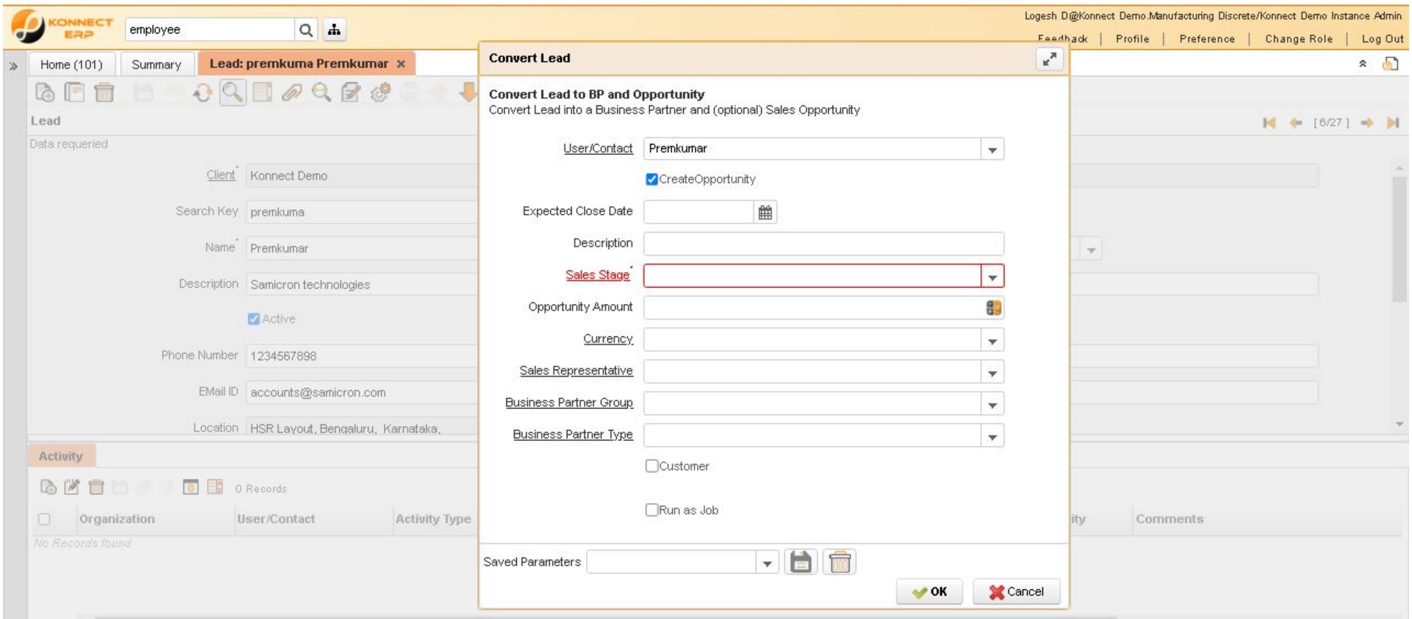
Process

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

Preceding and Succeeding Window

Lead Connected Window

Preceding Window

Succeeding Window

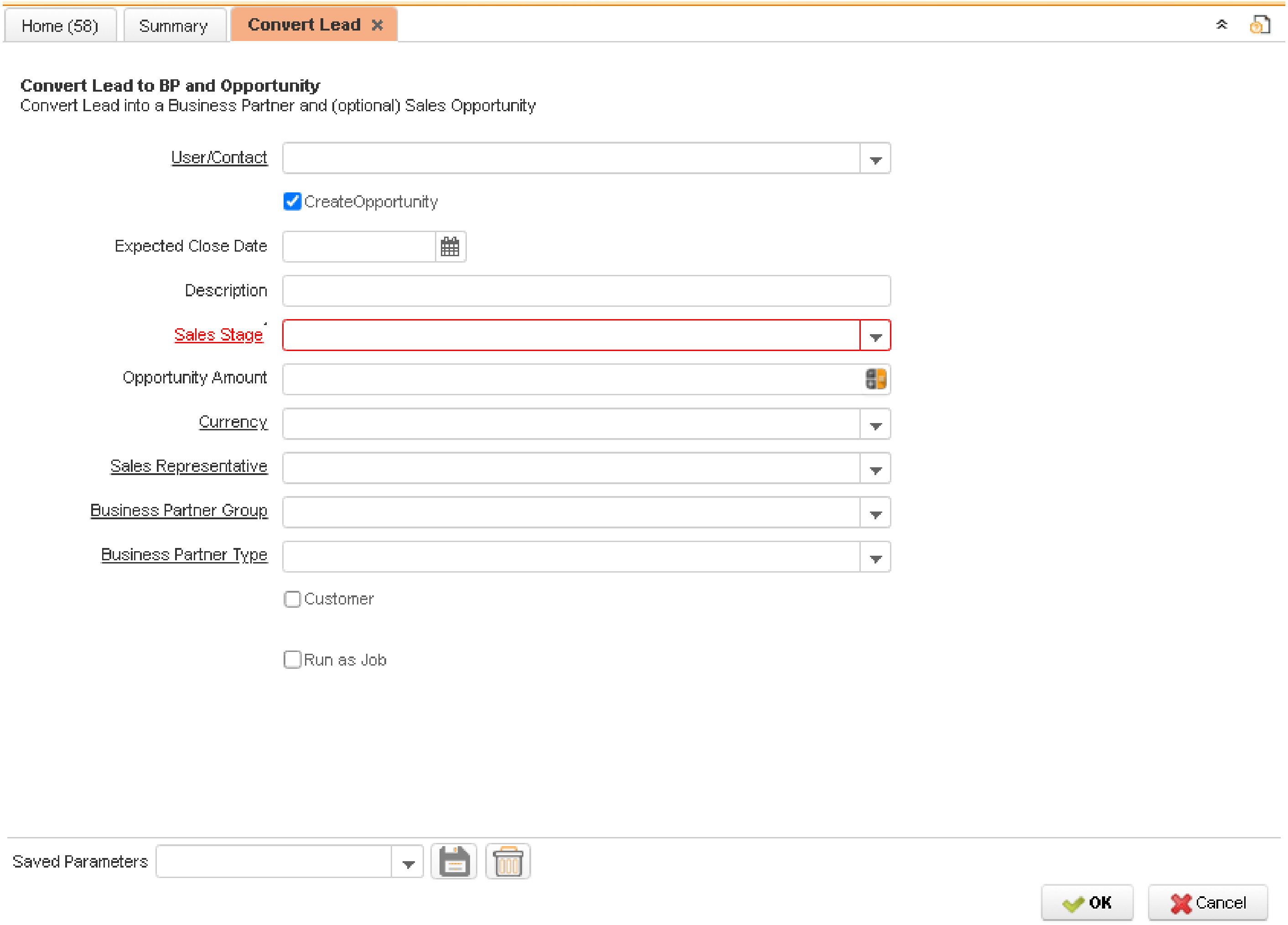
Lead (Expired)

Sales Opportunity :- Sales Opportunity

Customer :- Customer

Form and Process

Convert Lead



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.