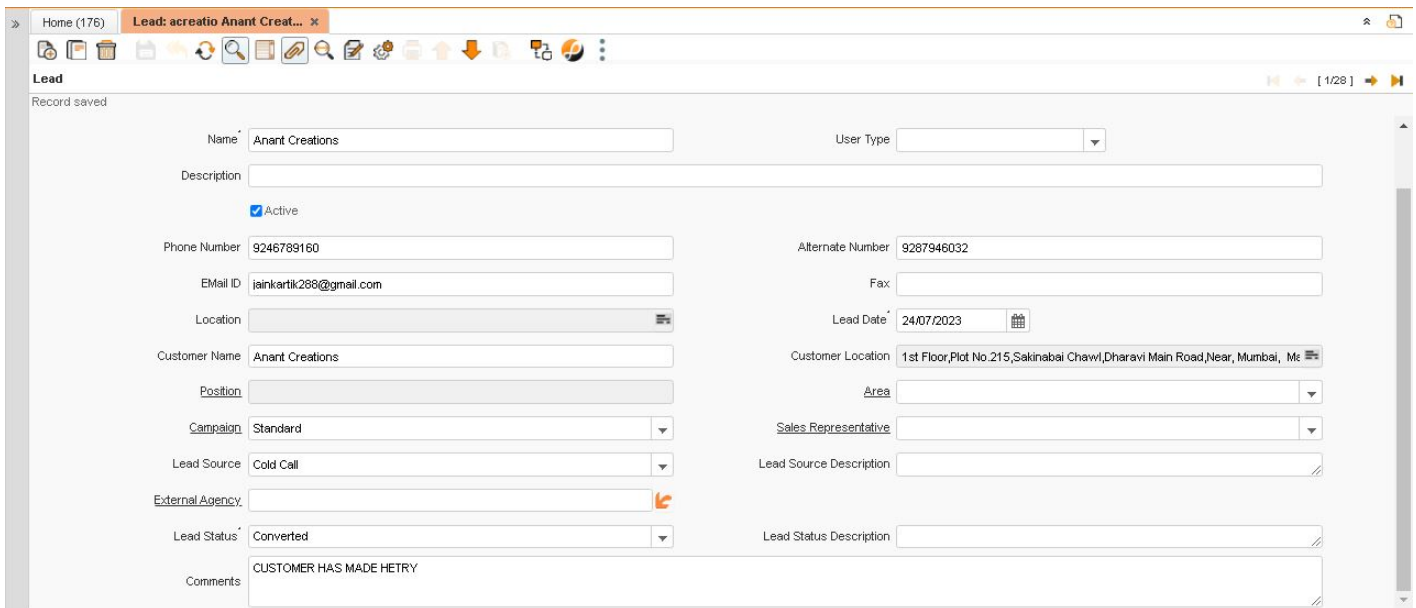


Lead Header



The screenshot shows a web browser window with a tab titled 'Lead: acreation Anant Creat...'. The browser's address bar shows 'Home (176)'. The page has a toolbar with various icons for file operations. The main content area is titled 'Lead' and shows a 'Record saved' message. The form contains the following fields:

- 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: [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

Revision #11

Created Mon, Jun 8, 2020 4:25 PM by [Vijayakumar S](#)

Updated Tue, Nov 14, 2023 11:59 AM by [Logesh D](#)