

Order Process

Convert Lead

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

The screenshot displays the 'Convert Lead' dialog box in the Konnect ERP system. The dialog is titled 'Convert Lead' and 'Convert Lead to BP and Opportunity'. It contains the following fields and options:

- User/Contact:** A dropdown menu showing 'Premkumar'.
- Create Opportunity:** A checked checkbox.
- Expected Close Date:** A date selection field.
- Description:** A text input field.
- Sales Stage:** A dropdown menu, highlighted with a red border.
- Opportunity Amount:** A text input field.
- 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.
- OK** and **Cancel** buttons at the bottom right.

The background shows a lead record for 'Premkumar' with the following details:

- Client:** Konnect Demo
- Search Key:** premkuma
- Name:** Premkumar
- Description:** Samicon technologies
- Active:** ☒
- Phone Number:** 1234567898
- Email ID:** accounts@samicon.com
- Location:** HSR Layout, Bengaluru, Karnataka

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

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