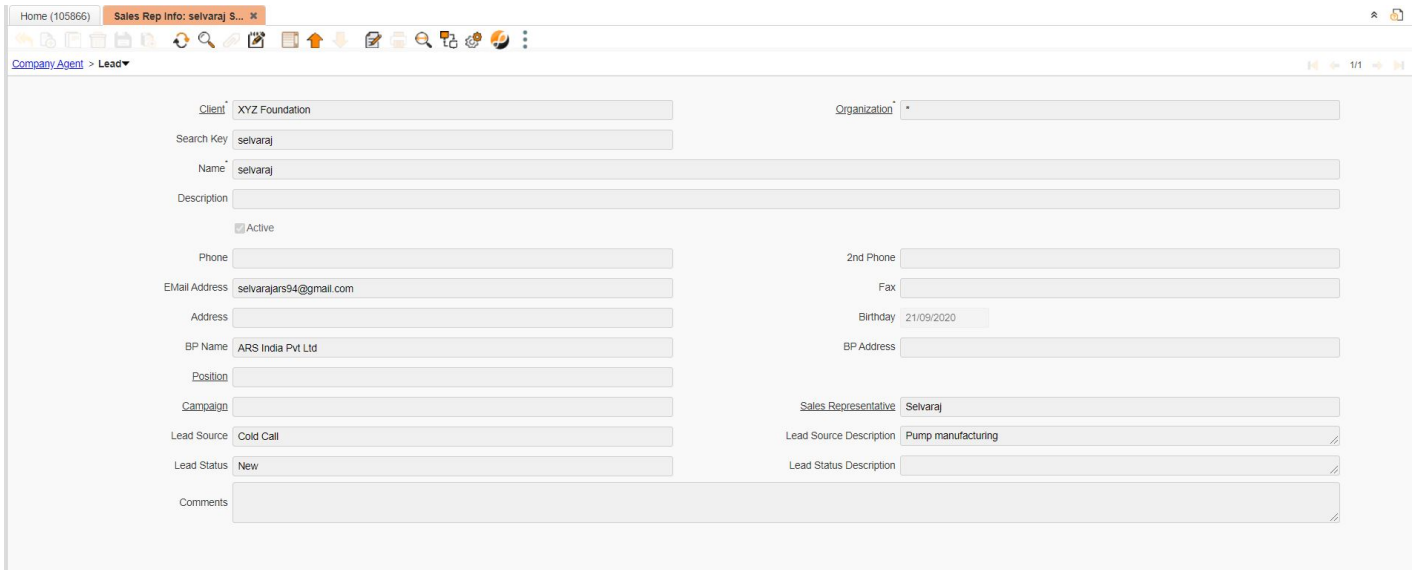


# Lead



The screenshot shows a web browser window with a CRM interface. The browser's address bar shows 'Home (105866)' and a tab titled 'Sales Rep Info: selvaraj S...'. The CRM page has a breadcrumb trail 'Company Agent > Lead' and a '1/1' indicator. The form is divided into two columns. The left column contains fields for 'Client' (XYZ Foundation), 'Search Key' (selvaraj), 'Name' (selvaraj), 'Description', an 'Active' checkbox, 'Phone', 'E-Mail Address' (selvarajars94@gmail.com), 'Address', 'BP Name' (ARS India Pvt Ltd), 'Position', 'Campaign', 'Lead Source' (Cold Call), 'Lead Status' (New), and 'Comments'. The right column contains fields for 'Organization', '2nd Phone', 'Fax', 'Birthday' (21/09/2020), 'BP Address', 'Sales Representative' (Selvaraj), 'Lead Source Description' (Pump manufacturing), and 'Lead Status Description'. The 'Comments' field is a large text area at the bottom.

## Critical Fields

1. Name : This field is used to enter the new customer contact person name
2. Lead Date : This Field is used to capture the date of the Lead
3. Phone : This Field is used to enter the Customer Phone Number
4. 2nd Phone : This Field is used to Capture the Customer Phone Number 2
5. Email address : This Field is used to Capture the Customer Email Address
6. Fax : This Field is used to capture Customer Fax Number
7. Customer name : This field is used to enter the new customer Name
8. Customer location : This Field is used to capture Customer Location
9. Lead source : This field is used to capture the source for the enquiry
  - 9.1 Cold call : By a cold call is the source for this enquiry
  - 9.2 Conference : Company Conference is the source for this enquiry

9.3 Customer portal : Customer portal is the source for this enquiry

9.4 Dealer : By a Dealer is the source for this enquiry

9.5 Email : Company Email as a source for this enquiry

9.6 Employee : By a Company Employee is the source for this enquiry

9.7 Existing customer : Existing Customer is the source for this enquiry

9.8 Magazine : Company in Magazine is the Source for this enquiry

9.9 Partner : By partner is the source for this enquiry

9.10 Trade show : By Company trade show is the source for this enquiry

9.11 Web site : Company Website is the source for this enquiry

9.12 Word of mouth : By Word of Mouth is the source for this enquiry

## 10. Lead status

10.1 Cold - Cold is the current status of the lead in the Entire cycle

10.2 Converted - This status defines that the lead is converted in the cycle

10.3 Expired - This status defines that the lead Time expired

10.4 Follow up - This status defines the lead is still in follow up

10.5 Hot - This status defines the lead is in a Converting Stage

10.6 New - This status defines the lead is new

10.6 Recycled - This status defines that the lead is Reworked

10.7 Warm - This status defines a normal lead stage in the entire cycle

10.8 Working - This status defines the lead is in IN progress

## 11. Lead Source description - Short Description of the lead source

## 12. Lead status Description - Short Description of the lead Status

## 13. Sales Representative : This field used for sales rep updating purpose , the record will display

from employee master when sales rep field is checked

## Critical & onetime setup fields

1.Organization:This Field is used to select the organization name

## Non-Critical Fields

1.Campaign

2.Comments

## Zoom condition's

## Customization

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