Leads

- Leads
- Overview Page Lead Definitions
- Customer Leads Overview Page
- Detail page

Leads

Title	Widget	Widget Description
Leads		1. Released and within validity period Click opens the summary page Available • Homepage dashboard • Customer details
Leads		1. The next 4 open leads (In progress and not expired), sorted by "Valid until" (Ascending) Click switches to the lead Colour code: Red: Valid until is already tomorrow. Yellow: Valid until is within the next 7 days 2. Number of valid leads (Released and within validity period) Click opens the summary page 3. Number of new leads since the last transfer Click opens the summary page, but shows only new leads since the last transfer Available a. Cockpit

General

Grid

Lists all leads (Released and within validity period)

Click	Swipe	Views

On dashboard: Summary page Lead definitions		1. Table
In customer details: Summary page Customer leads		1. Table

Column definition dashboard

Name	Visible	Sort	Full Text	Explanation
Name	Visible	ASC	Yes	Name of the job
Campaign	VisibleOnlyLandscape		Yes	
Valid from	VisibleOnlyLandscape			
Valid until	VisibleOnlyLandscape			
MQL	Visible			No. of customers who are Non-completed or In progress.
SQL	Visible			No. of customers who have status "Sales-qualified lead".
Converted	Visible			No. of customers who have status Converted.
Total	Hidden			
Non-completed	Hidden			
Deferred	Hidden			
No lead	Hidden			
In progress	Hidden			

FAQ

Release

Overview Page Lead Definitions

Title: Name of the lead

Kebab menu (⋮)

Type	Menu item	Explanation
✓	Show converted	Extends the overview to leads with the Lead status "Converted" when active
✓	Show no lead	Extends the overview to leads with the Lead status "No lead" when active

Grid

- Contains only leads that are not set to "No lead" or "Converted".
- Last time the job was processed for the customer

Click	Swipe	Views
Detail page	Convert	1st table

Column definition

Name	Visible	Sort	Full Text	Explanation

Colour code	ForceVisible			Green: Purple: Key account (from version 8) Blue: Prospect / Transfer customer Red: Delivery block Not assigned: orange Purple has the highest priority Blue is before "Not assigned" and before Delivery block. That means a not assigned prospect with delivery block is shown in blue. A "Not assigned" customer with delivery block is shown in orange.
Lead status	Visible			
Created by	Visible			From version 19
Qualification	Hidden			Everything that does not have the status "Sales-qualified lead" is MQL, otherwise SQL.
Last activity	Visible			dd.mm.yyyy hh:mm when the last activity for this lead occurred.
FOLLOW-UP	Visible			From version 19

Customer columns

Name	Visible	Sort	Full text	Explanation

Colour code	Forced			Purple: Key account Blue: Prospect, transfer customer, new customer Red: Delivery block Orange: Not assigned Purple has the highest priority Blue is before "Not assigned" and before delivery block. That means a not assigned prospect with delivery block is shown in blue. A "Not assigned" customer with delivery block is shown in orange.
Name 1	Visible	ASC	Yes	
Name 2	Hidden		Yes	
Name 3	Hidden		Yes	
Customer	Landscape		Yes	
Street	Landscape		Yes	
Postcode	Landscape		Yes	
City	Visible		Yes	
ABC Status	Hidden			
Country	Hidden			
Telephone number	Hidden			
Fax number	Hidden			
E-Mail	Hidden		Yes	
Sales office	Hidden			
Group of sales agents	Hidden			
Price list	Hidden			
Last visit	Hidden			Automatically determined.
Visiting frequency	Hidden			

Due date	Hidden			The text for this column is determined as follows: No invoice discount: no visiting frequency present in the customer master data No visit: no last visit present Not due: Last visit + visiting frequency > current calendar week Now: Last visit + visiting frequency == current calendar week Overdue (1): Last visit + visiting frequency < current calendar week Overdue (2): Last visit + (visiting frequency * 2) <= current calendar week
Visit duration	Hidden			
Tour	Hidden			
Start week	Hidden			
Client	Hidden			
Attribute1-16	Hidden			
Type (customer)	Hidden			
Currency	Hidden			
Area	Hidden			
Customer since	Hidden			
State	Hidden			
Main contact	Hidden			
Delivery block	Hidden			
Incoterms	Hidden			
Incoterms 2	Hidden			
Terms of payment	Hidden			
Terms of delivery	Hidden			
Customer group	Hidden			

Account group	Hidden			
Homepage	Hidden			
Listing	Hidden			
Send invoice separately	Hidden			
Delivery note without price	Hidden			
ILN	Hidden			
Invoice discount	Hidden			
Form of payment	Hidden			
Customer category	Hidden			
Price group code	Hidden			
Association	Hidden			
Advertising material	Hidden			
Tax Ident Number	Hidden			
VAT ID	Hidden			
Status	Hidden			
Order block	Hidden			
Assigned	Hidden			
Abbreviation	Hidden		Yes	

Customer Leads Overview Page

Lists all open leads of the customer

Title: Leads

Functions in the title bar

Icon	Explanation
+	Adds the customer to another lead definition

Grid

Click	Swipe	Views
Detail page		1st table

Column Definition

Name	Visible	Sort	Full Text	Explanation
Lead Status	Visible			
Lead	Visible			Name of the lead definition
Created by	Visible			From version 19

Name	Visible	Sort	Full Text	Explanation
Qualification	Hidden			Everything that does not have the status "Sales-qualified lead" is MQL, otherwise SQL.
Last activity	Visible			dd.mm.yyyy hh:mm when the last activity for this lead took place.
FOLLOW-UP	Visible			From version 19

Detail page

Title
Lead <Leadname>

General

Kebab menu (⋮)

Type	Menu item	Explanation
	Convert into an opportunity	Requires the right: Convert lead into opportunity. Only active if the lead has not yet been converted
	Reset status	Only active when you are in a converted lead
	CRM	Requires the task module

Header

1. Edit mode

- Follow-up date must not be in the past
- Follow-up date must not be after the end date of the lead list. If there is no end date, the check is omitted.
- Person in charge selectable via dropdown list, provided it is not a test user
- Apply button saves the changes to the lead

Widgets

Activities

- Opens the activities. All activities from the lead are marked in green, all other activities belong to the customer but not to the lead.
- When creating a new activity, it is automatically assigned to the lead.

New activity (Icon: +)

- Opens the form to create a new activity.
- This activity is automatically assigned to the lead.

Form

- Opens the form that belongs to the lead.

Lead status

- Opens a window (like a dropdown) with the following options
  - Non-completed
  - In progress
  - Deferred
  - Sales-qualified lead
    - E-mail subscription: Lead status Sales-qualified lead
  - No lead
- The lead status is automatically changed from Non-completed to In progress when one of the following events occurs:
  - The form is saved.
  - A new activity is created.
  - The follow-up date is saved.
- If the lead status is set to one of the following values, the lead form is automatically displayed, if available
  - Deferred
  - In progress
  - Non-completed
- If a lead has been converted and the status is then reset, the status cannot be set to converted again. In this case, "Converted" is provided in the status selection.

Documents

- Opens a window where files can be assigned to the lead.

E-Mail

- Opens the E-Mail widget to send an E-Mail to the Contact based on a centrally stored template. From version 21 onwards.

Hierarchy

- If the "Key account" module is licensed, it is possible to access the Customer hierarchy .

Contacts

- (A contact can be assigned to multiple leads and a lead can have multiple contacts; all contacts of the customer are displayed.)
- Top right: {number assigned}/{total contacts}
  - If a new contact is created, it is automatically assigned to the lead.
  - Action buttons on the contact detail page, only available if accessed via lead.
    - Link lead (if not yet linked)
    - Unlink lead (if already linked)
- Contact grid:
  - Swipe to "Link lead" or "Unlink lead".
  - Lead column: Shows whether the contact is already linked with the lead

Master data

1. Edit

Field	Reference	Editable	Display in customer change e-mail
Name 1		x	x
Name 2	Only visible if available.	x	x
Name 3	Only visible if available.	x	x
Telephone number	Only visible if available. Clickable to call the device's telephone function.	x	x
Fax number	Only visible if available.	x	x
Mobile Communication Number	Only visible if available.	x	x
E-mail	Only visible if available. Clickable to open a new e-mail in the default e-mail client.	x	x

Field	Reference	Editable	Display in customer change e-mail
E-mail for shipping notification	Only visible if available.	x	x
Purchaser	Only visible if available.		
Main contact	Only visible if available.		
Last visit	Automatically determined. Only visible if available.		
Last Contact In-House Staff	Automatically determined when an employee of type In-House Staff has recorded an activity for the customer. Only visible if available.		
Area	Only visible if available.		
ABC Identification	Only visible if available.	x	
Tour	Only visible if available.	x	
Visiting frequency	Only visible if available.	x	
Visit duration	Only visible if available.	x	
Start week	Only visible if available.	x	
Start year	Only visible if available.		
Customer since	Only visible if available.		
Homepage	Only visible if available. Clickable to open the URL with the default browser.	x	x
Short name	Only visible if available. Considered in full-text search		
Street	Only visible if available.	x	x
Postal code	Only visible if available.	x	x

Field	Reference	Editable	Display in customer change e-mail
Place	Only visible if available.	x	x
District	Only visible if available. Considered in full-text search		
Country / County	Only visible if available.		
Listing	Only visible if available.		
Delivery block	Only visible if available.		
Order block	Only visible if available.		
Maintain backlogs	Only visible if available.		
Partial delivery	Only visible if available.		
Send invoice separately	Only visible if available.		
Delivery note without price	Only visible if available.		
ILN	Only visible if available.		
Invoice discount	Only visible if available.		
Item discount	Only visible if available.		
Incoterms	Only visible if available.		
Free of freight	Only visible if available.		
Terms of payment	Only visible if available.		
Form of payment	Only visible if available.		
Terms of delivery	Only visible if available.		
Customer group	Only visible if available.		
Discount group	Only visible if available.		

Field	Reference	Editable	Display in customer change e-mail
Customer category	Only visible if available.		
Price list	Only visible if available.		
Price group code	Only visible if available.		
Branch type	Only visible if available.		
Association	Only visible if available.		
Membership number	Only visible if available.		
Sales office	Only visible if available.		
Group of sales agents	Only visible if available.		
Account group	Only visible if available.		
Advertising material	Only visible if available.		
Daily debit entry	Only visible if available.		
Client	Only visible if available.		
Tax Ident Number	Only visible if available.		
VAT ID	Only visible if available.		
Attribute 1-16	Only visible if available. Right BASIS / customer attributes	x	
Contact provided	Only visible if available.		
Status	Only visible if available.		
Credit limit	Only visible if available.		
Parent customer	Only visible if available and Key account module licensed		
Currency	Only visible if available.		

Field	Reference	Editable	Display in customer change e-mail
Managed by	Only visible if available.		

Convert

When converting, a lead is turned into an opportunity.
Opens the page to create a new opportunity for the customer/prospect.
Upon successful creation of the opportunity:

- Saves the resulting opportunity in the lead.
- Saves the lead from which the opportunity originated in the opportunity.
- Changes the status of the lead for the customer/prospect to "Converted"

FAQ

Why do I not see a certain employee in the selection "Person in charge"?

Only employees who do not have the "Test user" flag active in the backend are shown in the list.

Release