

# 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 |  |  | <p>Green: Purple: Key account (from version 8)</p> <p>Blue: Prospect / Transfer customer</p> <p>Red: Delivery block</p> <p>Not assigned: orange</p> <p>Purple has the highest priority</p> <p>Blue is before "Not assigned" and before Delivery block.</p> <p>That means a not assigned prospect with delivery block is shown in blue.</p> <p>A "Not assigned" customer with delivery block is shown in orange.</p> |
| 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    |     |     | <p>Purple: Key account<br/>Blue: Prospect, transfer customer, new customer<br/>Red: Delivery block<br/>Orange: Not assigned</p> <p>Purple has the highest priority<br/>Blue is before "Not assigned" and before delivery block.<br/>That means a not assigned prospect with delivery block is shown in blue.<br/>A "Not assigned" customer with delivery block is shown in orange.</p> |
| 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 |  |  | <p>The text for this column is determined as follows:</p> <p>No invoice discount: no visiting frequency present in the customer master data</p> <p>No visit: no last visit present</p> <p>Not due: Last visit + visiting frequency &gt; current calendar week</p> <p>Now: Last visit + visiting frequency == current calendar week</p> <p>Overdue (1): Last visit + visiting frequency &lt; current calendar week</p> <p>Overdue (2): Last visit + (visiting frequency * 2) &lt;= current calendar week</p> |
| 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 |  |

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Revision #9

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