

Sales Leads - Reminder Create

This section of the **Edit Lead** screen controls key date fields and reminder functionality for managing follow-ups and expected closure.

The screenshot shows the 'Edit Lead' interface for a lead named 'LD5'. The 'Manage Sales Leads' section is active, displaying various fields for lead management. The 'Est. Close Date' and 'Follow Up Date' fields are highlighted with a red box and a cream background respectively. The 'Follow Up Date' field has a 'Reminder' button next to it. The 'Lead Status' is 'In Progress'. The 'Owner' is 'Malcolm Granville'. The 'Customer' is 'Pets Hardware'. The 'Contact Person' is 'Pets Keet'. The 'Sales Rep.' is 'DEALER - Dealer'. The 'Lead Type' is 'Warm'. The 'Rating' is 'Warm'. The 'Status' is 'Interested in the new HP products'. The 'Description' is 'Likes the new product'. The 'Comments / Notes' field contains 'Additional notes'. The 'Probability' is '60%'. The 'Available Budget' is '0.0000'. The 'Budget Amount' is '0.0000'. The 'Est. Revenue' is '1000'. The 'Est. Cost' is '0.0000'. The 'Est. Profit' is '0.0000'. The 'Weighted Pipeline' is '600.0000'. The 'Division' is 'QT326'. The 'Region' is 'Preparation'. The 'Project' is 'Exp:2026-07-06'. The 'Quote No.' is 'QT326'. The 'Supplier' is 'Preparation'. The 'System Data' is 'Malcolm Granville 2020-07-09 07:50:05'. The 'Stage' is 'Stage 0 - Stage 0 : Account Management'. The 'Lead Date' is '2020-07-09'. The 'Est. Close Date' is '2020-07-25'. The 'Follow Up Date' is '2020-07-20'. The 'Customer Type' is 'New'. The 'Route to Market' is 'Source:'. The 'Activity Category' is 'Colour Code:'. The 'Supplier' is 'Supplier:'. The 'Save & New', 'Save & Close', 'Save', and 'Close' buttons are at the bottom. The 'Create Support Log', 'Info', and 'Print' buttons are at the bottom right.

Field Layout & Display

- The **date fields are reduced in size** to improve screen layout and usability.
- The **Follow Up Date** is positioned **below the Estimated Close Date** (swapped from the original layout).
- The **Follow Up Date** field is **highlighted with a cream background**, making it easily identifiable as a priority action item.

Reminder Buttons

- A **Reminder button** is available next to both:

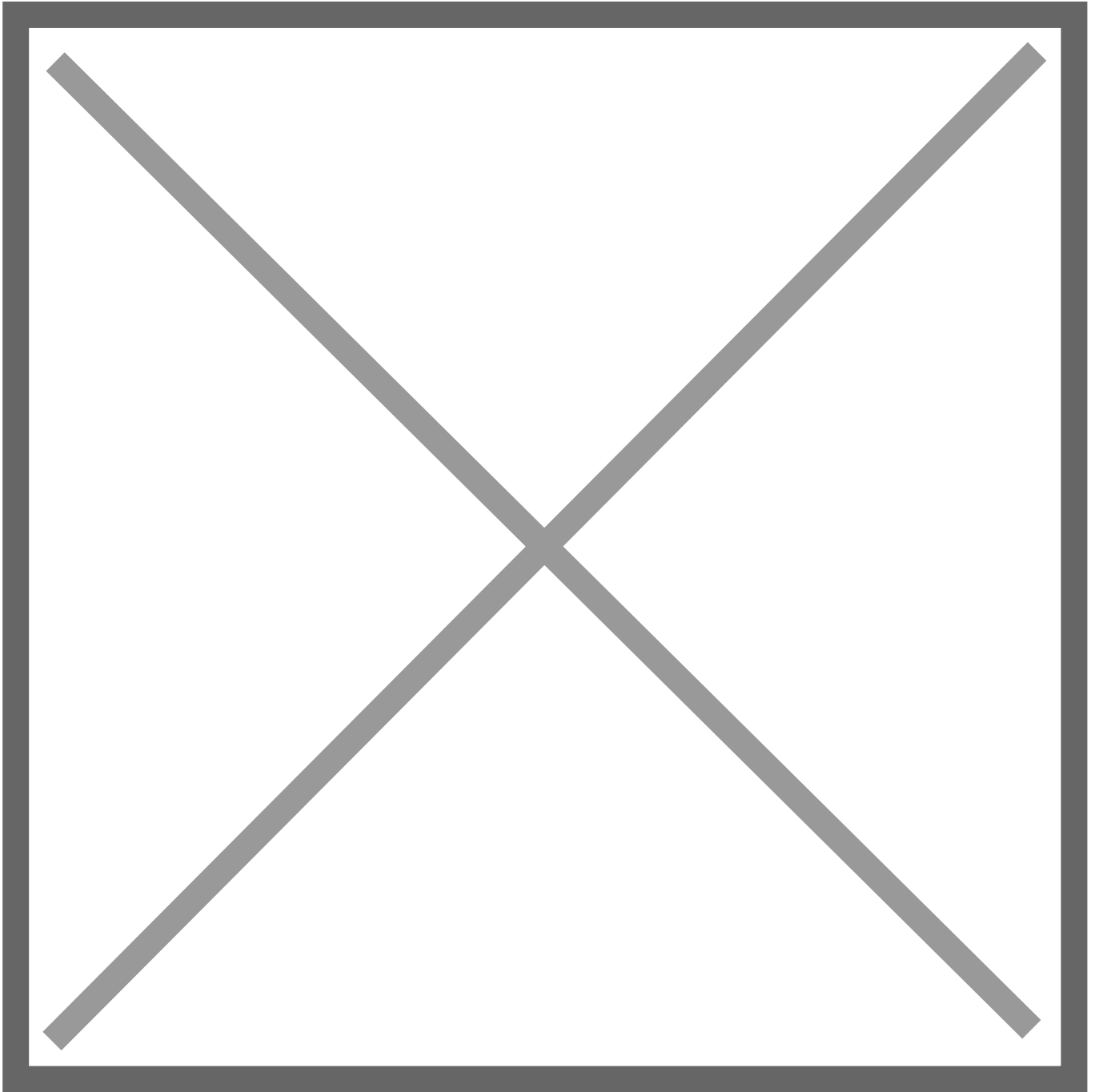
- **Estimated Close Date**
- **Follow Up Date**
- These buttons allow users to manually create or view reminders linked to each date.

Follow Up Reminder Tick Box

A **tick box** is located next to the **Follow Up Date** field, controlling automatic reminder creation.

Behaviour:

- **When adding a new Sales Lead**
 - The tick box is **selected (on)** by default.
- **When editing an existing Sales Lead**
 - The tick box is **unselected (off)** by default.
- **When saving the lead (Save or Save & Close)**
 - If the tick box is **selected**, a reminder is **automatically created** based on the Follow Up Date.
- **If the Follow Up Date is changed**
 - The user must **re-select (tick) the box** to confirm a new reminder should be created.
- **When saving again with the tick box selected**
 - A **new reminder is created** using the updated Follow Up Date.



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