

Tabs

- Contact Header
- Activity

Contact Header

The screenshot shows a CRM interface for a contact named 'Gowtham Demo'. The form includes the following fields:

- Client:** Konnect Demo
- Organization:** *
- Name:** Gowtham Demo
- Description:** Gowtham Demo
- Comments:** (Empty text area)
- E-Mail ID:** gowthamdemo@konnectbi.com
- Active:**
- Phone Number:** (Empty)
- Alternate Number:** (Empty)
- Title:** (Empty)
- Fax:** (Empty)
- Business Partner:** Gowtham Demo
- Partner Location:** (Empty)
- Position:** (Empty)
- Birthday:** 18/11/2020
- Last Contact:** (Empty)
- Last Result:** (Empty)

Below the form is an 'Activity' section with a table header:

Organization	User/Contact	Activity Type	Description	Sales Representative	Sales Opportunity	Com
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No Records found

Critical fields

1. Organization :- This field is used to select the organization
2. Name: Name of contact or user
3. Birthday: Date of birth of contact or user

Non-Critical fields

1. Description: Used to note details or any other specifics of contact or user.
2. Comments: Used to note details or any other specifics of contact or user.
3. E-Mail ID: Mail ID of User or Contact
4. Phone Number: Phone number details Contact or user
5. Alternate Number: Alternate number details of Contact or user
6. Title: Title before name of Contact or user (Mr, Miss, Dr, Sr, Sir.)

7. Fax: Fax details of Contact or user
8. Business Partner: Business partner details if he belongs to particular company
9. Partner Location: Location details
10. Position: It is master data used to maintain Designation or position details
(Sr.Manager,Manager,Teamleader,Trainee,Jr.engineer.)
11. Last Contact: Last Contact date
12. Last Result: Last results.

Activity

The screenshot shows a CRM interface for an activity record. The breadcrumb trail is 'Contact > Activity'. The form is titled 'Inserted' and contains the following fields:

- Client:** Konnect Demo
- Organization:** (Empty dropdown)
- User/Contact:** ~Gowtham Demo~
- Activity Type:** (Empty dropdown)
- Description:** (Empty text area)
- Sales Representative:** (Empty dropdown)
- Sales Opportunity:** (Empty dropdown)
- Travel KM:** 0.0
- Comments:** (Empty text area)
- Start Date:** 07/08/2023 3:48:15 PM
- End Date:** (Empty date/time field)
- Complete:**
- Follow Up:**

Critical

1. Activity Type: Activity type For Example Email, Meeting, Online meeting, Phone call, Task
2. Description: To note Specifics and Details of activity

Non-Critical

1. Sales Representative: It is a master data used to maintain details of sales representative.
2. Sales opportunity: If a contact is made from a sales opportunity, the information about the sales opportunity will be straightaway retrieved.
3. Travel KM: Travelled distance in Kilometer unit
4. Comments: Comments about activity
5. Start date: Start date and time of activity
6. End date: End date and time of activity