

Tabs

- Contact Header
- Activity

Contact Header

The screenshot shows a CRM interface with a contact header form. The form is titled 'Contact: Gowtham Demo' and includes various fields for contact information. The 'Client' field is set to 'Konnect Demo' and the 'Organization' field is marked with an asterisk. The 'Name' field contains 'Gowtham Demo', and the 'Description' field also contains 'Gowtham Demo'. The 'Comments' field is empty. The 'EMail ID' field contains 'gowthamdemo@konnectbi.com'. The 'Phone Number' field is empty. The 'Alternate Number' field is empty. The 'Title' field is empty. The 'Business Partner' field is set to 'Gowtham Demo'. The 'Partner Location' field is empty. The 'Position' field is empty. The 'Birthday' field is set to '18/11/2020'. The 'Last Contact' field is empty. The 'Last Result' field is empty. The 'Active' checkbox is unchecked. Below the form is an 'Activity' section with a table showing 0 records. The table has columns for Organization, User/Contact, Activity Type, Description, Sales Representative, Sales Opportunity, and Comments. The status 'No Records found' is displayed below the table.

Home (63) Summary **Contact: Gowtham Demo**

Client* Konnect Demo Organization* *

Name* Gowtham Demo

Description Gowtham Demo

Comments

EMail ID gowthamdemo@konnectbi.com ☐ Active

Phone Number Alternate Number

Title Fax

Business Partner Gowtham Demo Partner Location

Position Birthday 18/11/2020

Last Contact Last Result

Activity

0 Records

Organization	User/Contact	Activity Type	Description	Sales Representative	Sales Opportunity	Comments
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. EMail 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

Home (63) | Summary | *Contact: Gowtham Demo x

Contact > Activity

Inserted

Client * Konnect Demo

Organization * [Redacted]

User/Contact ~Gowtham Demo~

Activity Type * [Redacted]

Description * [Redacted]

Sales Representative [Redacted]

Sales Opportunity [Redacted]

Travel KM [Redacted] 0.0

Comments [Redacted]

Start Date 07/08/2023 3:48:15 PM

End Date [Redacted]

☐ 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