Tabs

- Contact Header
- Activity

Contact Header

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

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