

Contact

- Introduction
 - Introduction
- Tabs
 - Contact Header
 - Activity
- Validation
 - Validations
- Video
 - Video

Introduction

Introduction

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Contact is a Master data used to update User/Contact details of particular person, Company, Vendor, Customer ect.

Business Example

Tabs

Contact Header

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

Contact [1/143]

Client: Organization:

Name:

Description:

Comments:

EMail ID: Active

Phone Number: Alternate Number:

Title: Fax:

Business Partner: Partner Location:

Position: Birthday:

Last Contact: Last Result:

Activity

0 Records

<input type="checkbox"/>	Organization	User/Contact	Activity Type	Description	Sales Representative	Sales Opportunity	Com
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.

Tabs

Activity

The screenshot shows a web browser window with a CRM interface. The browser tabs include 'Home (63)', 'Summary', and '*Contact: Gowtham Demo *'. The page title is 'Contact > Activity'. The form is titled 'Inserted' and contains the following fields:

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

Validation

Validation

Validations

Video

Video

Video