

Contact

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Introduction

Introduction

Introduction

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

Business Example

Tabs

Contact Header

The screenshot shows a CRM interface with a tabbed header. The active tab is 'Contact: Gowtham Demo'. Below the tabs is a toolbar with various icons. The main form area contains the following fields:

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

Below the form is an 'Activity' section with a toolbar and a table. The table has the following columns: Organization, User/Contact, Activity Type, Description, Sales Representative, Sales Opportunity, and Comments. The table is currently empty, showing '0 Records' and '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.

Tabs

Activity

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

Client * Kconnect Demo Organization *

User/Contact ~Gowtham Demo~ Activity Type *

Description *

Sales Representative Sales Opportunity

Travel KM 0.0

Comments

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

☐ 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