

Tab

- Enquiry
- Product
- Activity
- Custom Fields

Enquiry

Home (58) Summary CreateQuotation(Enquiry) × CreateOrder(Enquiry) × Enquiry: 1000002 ×

Enquiry

Data requested

Client Konnect Demo Organization Automobile Industry

Document Type Enquiry Consumer

Document No 1000002 Currency INR

Business Partner mUkund User/Contact

Campaign Sales Representative Gobinath

Opportunity Amount 50,000.00 Expected Close Date

Reason

Description

Comments

Document Status In Progress IsEnquiry

Document Action Processed

Reference

Order

Critical Fields:

1. **Business Partner:** We can select existing/new customers here and this field is used to maintain customer
2. **Consumer :** Used to mention the consumer name
3. **Currency :** Used to mention the Currency Name in the document
4. **Expected Close Date :** Estimated Close date of the Enquiry
5. **Sales Representative :** This field is used for sales rep updating purposes, It will display from the employee master when the sales rep field is checked
6. **Opportunity Amount :** Used to Mention the Opportunity Amount

Critical & one-time setup fields:

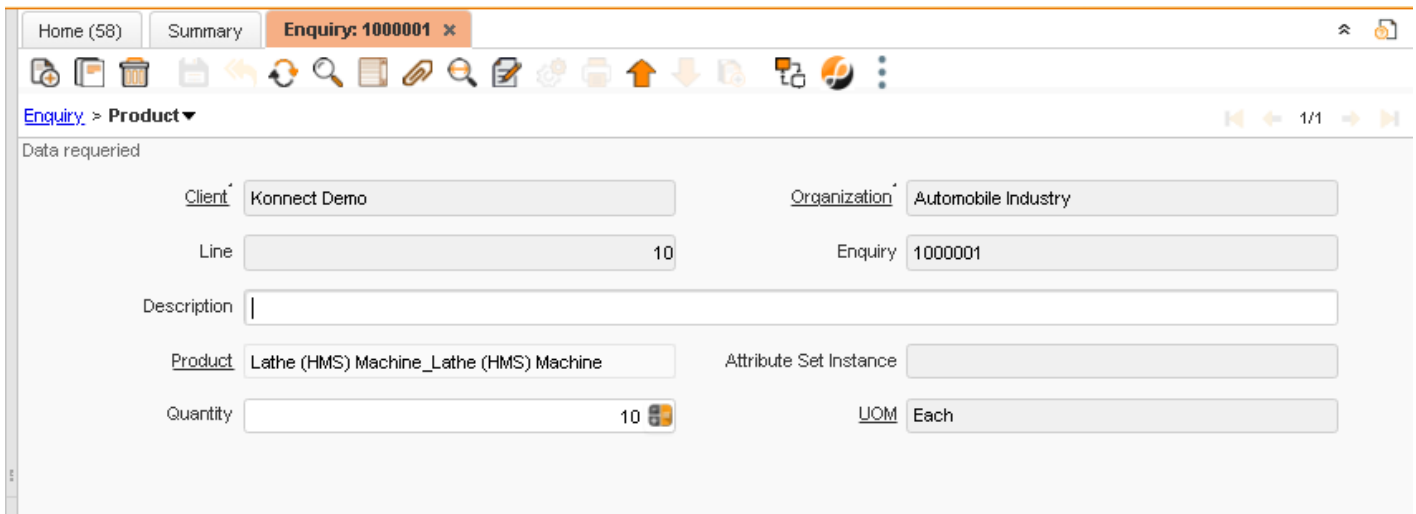
1. Organization : This field is used to select the organization
 2. Document Type : This Field is used to select the type of document that you are going to process
-

Non-Critical Fields:

1. Campaign: This field is used to select the campaign type
 2. Description : Used to mention the extra details about the Document.
 3. Comments : Used to maintain the comments about the document.
-

Zoom Conditions:

Product



Home (58) Summary **Enquiry: 1000001** x

Enquiry > Product

Data requiered

Client	Konnect Demo	Organization	Automobile Industry
Line	10	Enquiry	1000001
Description			
Product	Lathe (HMS) Machine_Lathe (HMS) Machine	Attribute Set Instance	
Quantity	10	UOM	Each

Critical Fields :

1. Line : Used to mention the line number
2. Product : Used to mention the product name in the tab
3. Description : Used to Maintain the Extra details about the document
4. Quantity : Used to mention the Quantity Details
5. UOM : Used to maintain the Unit details about the Product
6. Attribute Set Instance : Used to maintain the Attribute details about the product.

Activity

Home (58) Summary **Enquiry: 1000001** x

Enquiry > Activity 1/1

Data requested

Client	Konnect Demo	Organization	Automobile Industry
Description	tesy		
Enquiry	1000001	Sub Activity	
Accounts		Business Partner	
Start Date	07/09/2023 5:36:38 PM	End Date	
Comments			
Sales Representative	Bharath	User/Contact	
Activity Type	Meeting	<input type="checkbox"/> Complete	
Sales Opportunity		<input type="checkbox"/> Follow Up	
Travel KM	0.0	Follow Up Date	
Contacts			
Remind Before(Minutes)	15		

Critical Field :

1. Start Date : It is used to give the Activity start date
2. End Date : It is used to give the Activity end date
3. Sales Representative : It is used to select the sales rep for this activity
4. User Contact : Used to select the User contact from this Activity
5. Activity Type : Used to select the activity type like E-Mail, Meeting, Online Meeting, Phone Call, Task
6. Travel KM : Used to maintain Travel kilometer
7. Follow Up : This Check box is used to Mention if the follow up is required or not
8. Complete : This check box is used to maintain the activity is completed or not
9. Follow Up Date : Used to mention the follow up date
10. Remind Before : Used to mention the Remind Before time

11. Sub Activity : Used to mention the sub activity type from the master.
12. Complete : This Check box is used to mention that the activity is completed or not.


Non-Critical Field :

1. Description : Used to give the extra details about the activity
2. Comments : Used to maintain any comments about the Activity

Custom Fields

Order > Custom Fields ▾

Inserted

Client	XYZ Foundation	Organization	HQ
Sequence	<input type="text" value="1"/> 	Order	80037_22/04/2019
Custom Columns	<input type="text" value=""/>		
Value Column	<input type="text" value=""/>		

Critical Fields:

1. Sequence: Method of ordering records (lowest number comes first)
 2. Custom columns: Additional field used for reporting purposes
 3. Value : It is used to give the value of the custom column
 4. Description : Used to maintain the extra details about the Custom column.
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Critical & one-time setup fields:

Non-Critical Fields:

Zoom conditions: