

Activity

The screenshot shows a web form for creating an activity. It includes several input fields and checkboxes. The 'Client' field is set to 'Konnect Demo'. The 'Organization' field has a dropdown arrow. The 'User/Contact' field is set to 'zuvansky12'. The 'Activity Type' field is a dropdown menu. The 'Description' field is a large text area. The 'Sales Representative' field is a dropdown menu. The 'Sales Opportunity' field is a dropdown menu. The 'Comments' field is a large text area. The 'Start Date' field is set to '08/06/2020' and '11:15:57 AM'. The 'End Date' field is empty. There are two checkboxes: 'Complete' and 'Follow Up'.

Client	Konnect Demo	Organization	
User/Contact	zuvansky12		
Activity Type			
Description			
Sales Representative			
Sales Opportunity			
Comments			
Start Date	08/06/2020 11:15:57 AM	End Date	
<input type="checkbox"/> Complete		<input type="checkbox"/> Follow Up	

Critical Fields

1. Activity Type - It defines the Activity type in Follow ups

1.1 Email - It defines the Activity is happened through Email

1.2 Meeting - It defines the Activity is happened in meeting

1.3 Phone call - It defines the Activity is happened through call

1.4 Task - It defines the Activity is happened through a task

2. Description - short Description of the Activity.

3. Sales Representative : This field is used for sales rep updating purpose, the record will display from employee master when sales rep field is checked

4. Sales opportunity : Sales opportunity document details updating purpose

5. Start Date : Lead start date

6. End date : Lead end date

7. Follow up - check box is enable Below fields are available

7.1 Follow Up Date

Critical & onetime setup fields

Non-Critical Fields

Zoom condition's

Customization


Convert Lead to BP and Opportunity

To click process button


Convert Lead


Convert Lead to BP and Opportunity
Convert Lead into a Business Partner and (optional) Sales Opportunity


☒ Create Opportunity


Expected Close Date 

Description

Sales Stage 

Opportunity Amount 

Currency 

Sales Representative 

☐ Customer

☐ Run as Job

Saved Parameters 