

Activity

The screenshot shows a form for creating or editing an activity. The fields are as follows:

- Client:** Konnect Demo
- Organization:** [Dropdown menu]
- User/Contact:** zuvansky12
- Activity Type:** [Dropdown menu]
- Description:** [Text area]
- Sales Representative:** [Dropdown menu]
- Sales Opportunity:** [Dropdown menu]
- Comments:** [Text area]
- Start Date:** 08/06/2020 11:15:57 AM
- End Date:** [Date and time picker]
- Complete:**
- 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 used for sales rep updating purpose , the regard 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  

 

