

Activity

The screenshot shows a web form for creating or editing an activity. The form includes the following fields and controls:

- Client:** A text field containing "Konnect Demo".
- Organization:** A dropdown menu with a small downward arrow.
- User/Contact:** A text field containing "zuvansky12".
- Activity Type:** A dropdown menu.
- Description:** A large text area for entering a description.
- Sales Representative:** A dropdown menu.
- Sales Opportunity:** A dropdown menu.
- Comments:** A large text area for adding comments.
- Start Date:** A date and time picker showing "08/06/2020" and "11:15:57 AM".
- End Date:** A date and time picker.
- Complete:** A checkbox.
- Follow Up:** A checkbox.

Critical Fields

1.Activity Type

- 1.1 Email
- 1.2 Email Campaign
- 1.3 Meeting
- 1.4 Online Meeting
- 1.5 Phone call
- 1.6 Social Media
- 1.7 Task
- 1.8 Whatsapp
- 1.9 Whatsapp Campaign

2.Description : Optional short description of the record

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
- 7.2 Remind Before(Minutes)

Critical & onetime setup fields

Non-Critical Fields

Zoom condition's

Customization

Revision #9

Created Mon, Jun 8, 2020 4:43 PM by [Vijayakumar S](#)

Updated Mon, Sep 9, 2024 3:33 PM by [Logesh D](#)