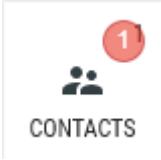


Service Description

Contacts

- [Contacts](#)
- [Contact details](#)
- [Contacts on Homepage Dashboard \(Additional Information\)](#)
- [Create / modify Contact](#)

Contacts

Title	Widget	Widget Description
Contacts		<div>1. Number of contacts</div> <div>Available:<ul style="list-style-type: none">• Customer details• Opportunities</div>

General

Functions in the title bar

Icon	Explanation
	Allows the creation of a new Contact

Grid

Click	Swipe	Views
Contact details		<div>1. Table</div>

Column definition

Name	Visible	Sort	Full Text	Explanation
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Colour code	ForceVisible			<p>Red: Has left the company Green: Main contact</p> <p>Red has a higher priority, i.e. a main contact who has left the company is shown in red.</p>
Title	Visible			
Last name	Visible	ASC	Yes	
First name	Visible		Yes	
Item	VisibleOnlyLandscape			
E-Mail	Hidden		Yes	Full text search is only active if there is an @ in the search term.
Telephone	Hidden		Yes	
Mobile communication	Hidden		Yes	
Fax	Hidden			
Department	Hidden			
Function	Hidden			
Advertising material	Hidden			
Item free text	Hidden			
Has left the company	Hidden			
Main contact	Hidden			

FAQ

Release

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Contact details

Title
First name Last name

Details

Functions in the title bar

Icon	Explanation
	Starts a workflow Only visible if the "Workflow" module is licensed and there is a corresponding workflow.

Kebab menu (:)

Type	Menu item	Explanation
	Workflows	Opens the workflow summary page Only visible if the "Workflow" module is licensed

Widgets

1x1

1. Notes
2. CRM
3. Lead (from version 12, requires Lead Management module, only visible if coming from a lead)
4. Opportunity (from version 12, requires Lead Management module, only visible if coming from a lead)
5. Leads (from version 12, requires Lead Management module, not visible if coming from a lead)
6. Opportunities (from version 12, requires Lead Management module, not visible if coming from a lead)

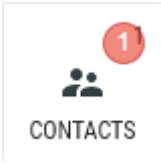
Master data

- Email is clickable and opens the default email client
- Telephone number and Mobile communication are clickable on smartphones and initiate a call.
- Pen opens the [Edit](#) page.

FAQ

Release

Contacts on Homepage Dashboard (Additional Information)

Title	Widget	Widget Description
Contacts		1. Quantity of Contacts Available: <ul style="list-style-type: none">Homepage Dashboard

Summary Page

Lists and searches contacts of Assigned to an agent and not Deleted Customers in the client.

Kebab menu (:)

Type	Menu Item	Explanation
✓	Not assigned	Also searches Not assigned Customers

✓	Has left the company	Also shows Has left the company contacts

Grid

Click	Swipe	Views
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Contact details	1. Opens the customer's detail page	1. Table
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Column Definition

Name	Visible	Sort	Full Text	Explanation
Colour code	ForceVisible			Red: Has left the company Green: Main contact Red has a higher priority, i.e. a main contact who has left the company is shown in red.
Title	Visible			
Last name	Visible	ASC	Yes	
First name	Visible		Yes	
Item	VisibleOnlyLandscape			
E-Mail	Hidden		Yes	Full text search is only active if there is an @ in the search term.
Telephone	Hidden		Yes	
Mobile communication	Hidden		Yes	
Fax	Hidden			
Department	Hidden			
Function	Hidden			
Advertising material	Hidden			
Item free text	Hidden			
Has left the company	Hidden			

Name	Visible	Sort	Full Text	Explanation
Main contact	Hidden			

Customer columns (only present if accessed via start dashboard.)

Name	Visible	Sort	Full text	Explanation
Colour code	Forced			<p>Purple: Key account Blue: Prospect, transfer customer, new customer Red: Delivery block Orange: Not assigned</p> <p>Purple has the highest priority Blue is before "Not assigned" and before delivery block. That means a not assigned prospect with delivery block is shown in blue. A "Not assigned" customer with delivery block is shown in orange.</p>
Name 1	Visible	ASC	Yes	
Name 2	Hidden		Yes	
Name 3	Hidden		Yes	
Customer	Landscape		Yes	
Street	Landscape		Yes	
Postcode	Landscape		Yes	
City	Visible		Yes	
ABC Status	Hidden			
Country	Hidden			
Telephone number	Hidden			
Fax number	Hidden			
E-Mail	Hidden		Yes	
Sales office	Hidden			
Group of sales agents	Hidden			
Price list	Hidden			

Name	Visible	Sort	Full text	Explanation
Last visit	Hidden			Automatically determined.
Visiting frequency	Hidden			
Due date	Hidden			<p>The text for this column is determined as follows:</p> <p>No invoice discount: no visiting frequency present in the customer master data</p> <p>No visit: no last visit present</p> <p>Not due: Last visit + visiting frequency > current calendar week</p> <p>Now: Last visit + visiting frequency == current calendar week</p> <p>Overdue (1): Last visit + visiting frequency < current calendar week</p> <p>Overdue (2): Last visit + (visiting frequency * 2) <= current calendar week</p>
Visit duration	Hidden			
Tour	Hidden			
Start week	Hidden			
Client	Hidden			
Attribute1-16	Hidden			
Type (customer)	Hidden			
Currency	Hidden			
Area	Hidden			
Customer since	Hidden			
State	Hidden			
Main contact	Hidden			
Delivery block	Hidden			
Incoterms	Hidden			

Name	Visible	Sort	Full text	Explanation
Incoterms 2	Hidden			
Terms of payment	Hidden			
Terms of delivery	Hidden			
Customer group	Hidden			
Account group	Hidden			
Homepage	Hidden			
Listing	Hidden			
Send invoice separately	Hidden			
Delivery note without price	Hidden			
ILN	Hidden			
Invoice discount	Hidden			
Form of payment	Hidden			
Customer category	Hidden			
Price group code	Hidden			
Association	Hidden			
Advertising material	Hidden			
Tax Ident Number	Hidden			
VAT ID	Hidden			
Status	Hidden			
Order block	Hidden			
Assigned	Hidden			
Abbreviation	Hidden		Yes	

Create / modify Contact

General

Functions in the title bar

Icon	Explanation
	<p>The AI function business card scan is only available for mobile devices (iOS and Android).</p> <p>The image is scanned and sent to the server. It is then evaluated and the corresponding data record is sent back to the client. That means the device must be online for this.</p>

Details

Field	Right	Reference
Title		Code table: Contact - Title (Is mandatory)
First name	BASIS / contact / First name is compulsory	
Last name		Is mandatory
Telephone		
Mobile Phone		
Fax		
E-Mail		
Function		
Department		Code table: Department

Field	Right	Reference
Item		Code list: Position status from APA (Is mandatory)
Item	BASIS / contact / Show "Item" free text	
Date of birth		Date
Has left the company		Checkbox
Main contact		Checkbox
Advertising material		Checkbox

Additional information

Field	Right	Reference
Receives order confirmation		Checkbox
Informal form of address possible		Checkbox