Service Description FOLLOW-UP

- FOLLOW-UP
- KPI Widget Follow-ups

FOLLOW-UP

Title	Widget	Widget Description
Follow-ups		1. Quantity of entries with a follow-up date that are not Completed. Click: Summary page (Display is pre-filtered to Follow-up date < Today) Available: • Homepage dashboard
Follow-ups		1. The next 4 open entries, sorted by next follow-up date Ascending Colour code: Red: Follow-up date exceeded. Yellow: Follow-up date Today Click: Switches to the detail page of the Object 2. Quantity of follow-up dates < Today that are not Completed. Click: Summary page (Display is pre-filtered to Follow-up date < Today) 3. Quantity of entries with follow-up date that are not Completed. Click: Summary page Available: • Homepage dashboard

Summary page

1. Title: Follow-ups
2. Lists all Objects with a follow-up date that are not Completed, including those that, for example, are no longer present in a lead List.

Grid

Click	Swipe	Views
Detail page of the Object		Table

Column definition

Name	Visible	Sort	Full Text	Explanation
Colour code	ForceVisible			Red: Follow-up date < Today Yellow: Follow-up date = Today
Object	Visible			Workflow | Leads | Opportunities
Name	Visible			Name that the Object has
Follow-up	Visible			Date
Created	VisibleOnlyLandscape			Date
Addendum	Hidden			For Opportunities, the Level is displayed For Workflows, the Level name is displayed

Customer columns

Name	Visible	Sort	Full text	Explanation

Colour code	Forced			Purple: Key account Blue: Prospect, transfer customer, new customer Red: Delivery block Orange: Not assigned 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.
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			
Last visit	Hidden			Automatically determined.
Visiting frequency	Hidden			

Due date	Hidden			The text for this column is determined as follows: No invoice discount: no visiting frequency present in the customer master data No visit: no last visit present Not due: Last visit + visiting frequency > current calendar week Now: Last visit + visiting frequency == current calendar week Overdue (1): Last visit + visiting frequency < current calendar week Overdue (2): Last visit + (visiting frequency * 2) <= current calendar week
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			
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	

Workflows

For Workflow, the follow-up date corresponds to the field "Due on". Only query Workflows are displayed in the Follow-ups.

FAQ

Release

KPI Widget Follow-ups

Follow-ups due

Counts all follow-ups that are due today and in the past.



1. The number shows the quantity of due follow-ups
   - Red: There are due follow-ups
   - Black: There are no due follow-ups
2. The blue chart shows the quantity of all due follow-ups

	Included in count
Opportunity	x
Lead	x
Workflow	x

FAQ

Release