Service Description Documents

- Document overview
- Invoice / Credit note / Direct debit
- Order / Contract
- Quotation
- Delivery Note

Document overview

Title	Widget	Widget description
Documents		1. Number of documents Click: • Opens the overview page Available: • Customer details • Homepage dashboard

General

Kebab menu (⋮)

Type	Menu item	Explanation
◉	Orders	Basic configuration \ Roles \ <Role> \ STATISTICS / documents
◉	Delivery notes	Basic configuration \ Roles \ <Role> \ STATISTICS / documents
◉	Credit notes	Basic configuration \ Roles \ <Role> \ STATISTICS / documents
◉	Invoices	Basic configuration \ Roles \ <Role> \ STATISTICS / documents
◉	Quotations	Basic configuration \ Roles \ <Role> \ STATISTICS / documents
◉	Contracts	Basic configuration \ Roles \ <Role> \ STATISTICS / documents
◉	Direct debit notes	Basic configuration \ Roles \ <Role> \ STATISTICS / documents
◉	Stocktaking notes	Basic configuration \ Roles \ <Role> \ STATISTICS / documents
◉	Unpaid invoices	Basic configuration \ Roles \ <Role> \ STATISTICS

Grid

Click	Swipe	Views
Opens the document		1. Table

Column definition

Name	Visible	Sort	Full Text	Explanation
Colour code				Blue: Prospect / Transfer customer Red: Delivery block Not assigned: orange 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.

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	Visible	Sort	Full text	Explanation
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			

Name	Visible	Sort	Full text	Explanation
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			

Name	Visible	Sort	Full text	Explanation
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	

Document items



1. Document number
2. Document date

Kebab menu (⋮)

Type	Menu item	Explanation
	Document additional information	Is displayed if data is available. • The keys for which document additional information should be displayed can be maintained via Basic configuration \ Code table \ Document additional information. • If the document additional information relates to the individual product lines, the product must be selected beforehand.

Column definition

Name	Visible	Sort	Full Text	Explanation
Picture	VisibleOnlyLandscape			
Item	VisibleOnlyLandscape			
Product	VisibleOnlyLandscape			
Name	Visible			
Quantity	Visible			
Amount	Visible			
Batch	Hidden			
Total	Visible			

Summary row at the bottom edge of the grid

FAQ

Release

From version 16

The last selection of the document type is saved and reused on the next call, unless an explicit document type is specified by the call.

Invoice / Credit note / Direct debit

Header data

Grid

Click	Swipe	Views
Items	1. "Document flow" (from version 20)	1. Table

Column definition

Name	Visible	Sort	Full Text	Explanation
Number	Visible	DESC	Yes	
Date	Visible			
Type of invoice	VisibleOnlyLandscape			
Type of order	Hidden			From version 18
Order reason	Hidden			From version 18
Amount	Visible			
Customer document number	VisibleOnlyLandscape		Yes	
Posting date	Hidden			
Fixed value date	Hidden			
Client	Hidden			From version 16

Name	Visible	Sort	Full Text	Explanation
Document.Invoice.Attribute1	Hidden			From version 18
Document.Invoice.Attribute2	Hidden			From version 18
Document.Invoice.Attribute3	Hidden			From version 18
Document.Invoice.Attribute4	Hidden			From version 18
Document.Invoice.Attribute5	Hidden			From version 18

Items

Head

- Document number Type of invoice
- Document date
- Type of order
- Order reason
- Customer document number

Kebab menu (⋮)

Type	Menu item	Explanation
✓	Document additional information	Displays individually defined fields for the document header
✓	Customer	Only displayed when accessed via the summary from the dashboard
✓	Document flow	from version 20

Grid

Click	Swipe	Views
Item details		1. Table
Footer		Total (Amount)

Column definition

Name	Visible	Sort	Full Text	Explanation
Picture	VisibleOnlyLandscape			
Item	VisibleOnlyLandscape	ASC		
Product	VisibleOnlyLandscape		Yes	
Name	Visible		Yes	
Quantity	Visible			
Amount	Visible			
Batch	Hidden			
Total	Hidden			must be displayed if the footer is to show the document total
Discount	Hidden			from Release 20 Pure display, no calculating function.

Item details

Displays all data of the item

Kebab menu (⋮)

Type	Menu item	Explanation

✓	Document additional information	Displays individually defined fields for the document header • The keys for which document additional information should be displayed can be maintained via Basic configuration \ Code tables \ Document additional information. • If the document additional information relates to individual product lines, the product must be selected beforehand.
✓	To product	
✓	Document flow	from version 20

FAQ

Why are the document additional information fields greyed out?

If the document additional information is delivered from the ERP system but not displayed in the client, it may be because no code table entry has been created. Please contact your backend administrator and ask them to create the appropriate code tables.

Release

Order / Contract

Header data

Grid

Click	Swipe	Views
Items	1. "Document flow" (from version 20)	1. Table

Column definition

Name	Visible	Sort	Full Text	Explanation
Status				Red: if the status is "Cancelled". Green: if the status is "Completed". Orange: if the status is "In progress"
Number	Visible	DESC	Yes	
Date	Visible			
Req. delivery date	Visible			
Type of order	VisibleOnlyLandscape		Yes	
Order reason	Hidden			
Status	VisibleOnlyLandscape			Open In progress Completed Cancelled
Amount	Visible			
Customer document number	VisibleOnlyLandscape		Yes	
Client	Hidden			From version 16

Name	Visible	Sort	Full Text	Explanation
Beleg.Auftrag.Attribut 1	Hidden			From version 16
Beleg.Auftrag.Attribut 2	Hidden			From version 16
Beleg.Auftrag.Attribut 3	Hidden			From version 16
Beleg.Auftrag.Attribut 4	Hidden			From version 16
Beleg.Auftrag.Attribut 5	Hidden			From version 16

Items

Head

- Document number
- Document date
- Type of order
- Order reason
- Customer document number
- Req. delivery date

Kebab menu (⋮)

Type	Menu item	Explanation
✓	Document additional information	Displays individually defined fields for the Document Header • The keys for which the document additional information should be displayed can be maintained via Basic configuration \ Code tables \ Document additional information. • If the document additional information relates to individual product lines, the product must be selected first.

Type	Menu item	Explanation
✓	Customer	Only displayed when accessed via the Summary from the Dashboard
✓	Document flow	from version 20

Grid

Click	Swipe	Views
Item details		1. Table
Footer		Total (Amount)

Column definition

Name	Visible	Sort	Full Text	Explanation
Status				Red: if a cancellation reason exists Yellow: if the Delivered Quantity < the Item Quantity
Picture	VisibleOnlyLandscape			
Item	VisibleOnlyLandscape	ASC		
Product	VisibleOnlyLandscape		Yes	
Name	Visible		Yes	
Quantity	Visible			
Delivered	Hidden			
In progress	Hidden			
Amount	Visible			
Cancelled	Hidden			
Cancellation Reason	Hidden			
Batch	Hidden			

Name	Visible	Sort	Full Text	Explanation
Total	Hidden			must be displayed if the footer should show the document total
Discount	Hidden			from Release 20 Display only, no calculating function.

Item details

Displays all data of the item

Kebab menu (⋮)

Type	Menu item	Explanation
✓	Document additional information	Displays individually defined fields for the Document Header
✓	For product	
✓	Document flow	from version 20

FAQ

Why are the document additional information fields greyed out?

If the document additional information is delivered from the ERP system but not displayed in the client, it may be that no code table entry has been created. Please contact your backend admin and ask them to create the corresponding code tables.

Quotation

Header data

Grid

Click	Swipe	Views
Items		1. Table

Column definition

Name	Visible	Sort	Full Text	Explanation
Number	Visible	DESC	Yes	
Date	Visible			
Type of quotation	VisibleOnlyLandscape			
Status	VisibleOnlyLandscape			Open In progress Completed
Amount	Visible			
Customer document number	VisibleOnlyLandscape		Yes	
Client	Hidden			From version 16
Document.Quotation. Attribute1	Hidden			From version 16
Document.Quotation. Attribute2	Hidden			From version 18
Document.Quotation. Attribute3	Hidden			From version 18
Document.Quotation. Attribute4	Hidden			From version 18
Document.Quotation. Attribute5	Hidden			From version 18

Items

Head

- Document number
- Document date
- Type of order
- Order reason

Kebab menu (⋮)

Type	Menu item	Explanation
✓	Document additional information	Shows individually defined fields for the Document Header • The keys for which the document additional information should be displayed can be maintained via Basic configuration \ Code tables \ Document additional information. • If the document additional information relates to the individual product lines, the product must be selected beforehand.
✓	Customer	Only displayed when accessed via the Summary from the dashboard

Grid

Click	Swipe	Views
Item details		1. Table

Column definition

Name	Visible	Sort	Full Text	Explanation
Picture	VisibleOnlyLandscape			
Item	VisibleOnlyLandscape	ASC		
Product	VisibleOnlyLandscape		Yes	
Name	Visible		Yes	

Name	Visible	Sort	Full Text	Explanation
Quantity	Visible			
Amount	Visible			
Discount	Hidden			from Release 20 Pure display, no calculating function.

Item details

Displays all data of the item

Kebab menu (⋮)

Type	Menu item	Explanation
✓	Document additional information	Shows individually defined fields for the Document Header
✓	For the product	

FAQ

Why are the document additional information fields greyed out?

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Delivery Note

Header data

Grid

Click	Swipe	Views
Items		1. Table

Column definition

Name	Visible	Sort	Full Text	Explanation
Number	Visible	DESC	Yes	
Date	Visible			
Type of delivery	VisibleOnlyLandscape			
Type of order	Hidden			
Order reason	Hidden			
Status	VisibleOnlyLandscape			Open In progress (Orange) Completed (green)
Customer document number	VisibleOnlyLandscape		Yes	
Client	Hidden			From version 16
Document Header.Delivery Note.Attribute1	Hidden			From version 18
Document Header.Delivery Note.Attribute2	Hidden			From version 18
Document Header.Delivery Note.Attribute3	Hidden			From version 18
Document Header.Delivery Note.Attribute4	Hidden			From version 18

Name	Visible	Sort	Full Text	Explanation
Document Header.Delivery Note.Attribute5	Hidden			From version 18

Items

Head

- Document number
- Document date
- Type of order
- Order reason

Kebab menu (⋮)

Type	Menu item	Explanation
✓	Document additional information	Shows individually defined fields for the document header • The keys for which the document additional information should be displayed can be maintained via Basic configuration \ Code tables \ Document additional information. • If the document additional information relates to the individual product lines, the product must be selected beforehand.
✓	Customer	Only displayed when accessed via the Summary from the dashboard
✓	Document flow	from version 20

Grid

Click	Swipe	Views
Item details		1. Table

Column definition

Name	Visible	Sort	Full Text	Explanation
Picture	VisibleOnlyLandscape			
Item	VisibleOnlyLandscape	ASC		
Product	VisibleOnlyLandscape		Yes	
Name	Visible		Yes	
Quantity	Visible			

Item details

Displays all data of the item

Kebab menu (⋮)

Type	Menu item	Explanation
✓	Document additional information	Shows individually defined fields for the document header
✓	For the product	
✓	Document flow	from version 20

FAQ

Why are the document additional information fields greyed out?

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