

Document overview

Title	Widget	Widget description
Documents		<p>1. Number of documents</p> <p>Click:</p> <ul style="list-style-type: none">• Opens the overview page <p>Available:</p> <ul style="list-style-type: none">• 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			<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			
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

DOP4

1

Belegdatum

05.01.2024

2

- 1. Document number
- 2. Document date

Kebab menu (:)

Type	Menu item	Explanation
	Document additional information	Is displayed if data is available. <ul style="list-style-type: none">• 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.

Revision #9

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