

Customer details

Title	Widget	Widget description
Customer details		

General

Functions in the title bar

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

Kebab menu (:)

Type	Menu item	Explanation
	Request customer master data sheet	

	Create order	
	Create stocktaking	
	Create complaint	
	Create quotation	
	Facing	

Type	Menu item	Explanation
	Orders	

	Turnover	
	Documents	
	Unpaid invoices	
	Listing	
	Back Order	
	Discounts	

	Contacts	
	Activities	
	Addresses	
	Notes	
	Responsible	

	CRM	
	Tasks	
	Photos	

Header

1. Switch between the clients.

Details

Widgets

1x1 Widgets

1. [Delivery point](#)
2. [Addresses](#)
3. Activities
4. Amendments
5. [Create quotation](#)
6. Tasks
7. [Create order](#)
8. [Orders](#)
9. Documents
10. [Visiting times](#)
11. Opportunities
12. MRP list
13. Distribution
14. Documents
15. [Facing](#)
16. Photos
17. Hierarchy
18. Start stocktaking
19. Consignment stock
20. [Contacts](#)
21. Listing
22. Navigation
23. Notes
24. Unpaid invoices
25. Product numbers
26. [Discounts](#)
27. [Start complaint process](#)
28. Back Order
29. Appointments
30. Workflow
31. A widget named after the form for each customer CRM.

2x2 Widgets

1. Order value
2. Visit
3. Turnover
4. Turnover (target/actual)
5. Turnover (key date)

4x2 Widgets

1. Tasks
2. Appointments

Key account (from version 8)

If the record called up is a Key account, the widgets which contain all data of the assigned Key account when opened are displayed in purple.

Master data

Field	Reference	Editable	Display in customer change e-mail
Name 1		x	x
Name 2	Only visible if available.	x	x
Name 3	Only visible if available.	x	x
Telephone number	Only visible if available. Clickable to call the device's telephone function.	x	x
Fax number	Only visible if available.	x	x
Mobile Communication Number	Only visible if available.	x	x
E-mail	Only visible if available. Clickable to open a new e-mail in the default e-mail client.	x	x
E-mail for shipping notification	Only visible if available.	x	x
Purchaser	Only visible if available.		
Main contact	Only visible if available.		

Field	Reference	Editable	Display in customer change e-mail
Last visit	Automatically determined. Only visible if available.		
Last Contact In-House Staff	Automatically determined when an employee of type In-House Staff has recorded an activity for the customer. Only visible if available.		
Area	Only visible if available.		
ABC Identification	Only visible if available.	x	
Tour	Only visible if available.	x	
Visiting frequency	Only visible if available.	x	
Visit duration	Only visible if available.	x	
Start week	Only visible if available.	x	
Start year	Only visible if available.		
Customer since	Only visible if available.		
Homepage	Only visible if available. Clickable to open the URL with the default browser.	x	x
Short name	Only visible if available. Considered in full-text search		
Street	Only visible if available.	x	x
Postal code	Only visible if available.	x	x
Place	Only visible if available.	x	x
District	Only visible if available. Considered in full-text search		
Country / County	Only visible if available.		

Field	Reference	Editable	Display in customer change e-mail
Listing	Only visible if available.		
Delivery block	Only visible if available.		
Order block	Only visible if available.		
Maintain backlogs	Only visible if available.		
Partial delivery	Only visible if available.		
Send invoice separately	Only visible if available.		
Delivery note without price	Only visible if available.		
ILN	Only visible if available.		
Invoice discount	Only visible if available.		
Item discount	Only visible if available.		
Incoterms	Only visible if available.		
Free of freight	Only visible if available.		
Terms of payment	Only visible if available.		
Form of payment	Only visible if available.		
Terms of delivery	Only visible if available.		
Customer group	Only visible if available.		
Discount group	Only visible if available.		
Customer category	Only visible if available.		
Price list	Only visible if available.		
Price group code	Only visible if available.		
Branch type	Only visible if available.		

Field	Reference	Editable	Display in customer change e-mail
Association	Only visible if available.		
Membership number	Only visible if available.		
Sales office	Only visible if available.		
Group of sales agents	Only visible if available.		
Account group	Only visible if available.		
Advertising material	Only visible if available.		
Daily debit entry	Only visible if available.		
Client	Only visible if available.		
Tax Ident Number	Only visible if available.		
VAT ID	Only visible if available.		
Attribute 1-16	Only visible if available. Right BASIS / customer attributes	x	
Contact provided	Only visible if available.		
Status	Only visible if available.		
Credit limit	Only visible if available.		
Parent customer	Only visible if available and Key account module licensed		
Currency	Only visible if available.		
Managed by	Only visible if available.		

FAQ

Release

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