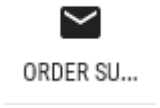
Order suggestion

Title	Widget	Widget Description
Order suggestion		Available: • Order entry • Returns entry • Quotation entry

General

Title bar

Icon	Explanation
	On iOS/Android the share function is called. On UWP the save dialog opens.
	Switches to the contact mask of the active customer.

Panel: E-Mail Recipient

Multiple selection is possible.

Conditions

The following recipients are displayed if an e-mail address is maintained:

1. Contacts of the active customer.
2. The own employee
3. Employees of type "Backoffice"
4. Employees of type "Dispatcher"
5. If the active customer has an e-mail address stored, the grid contains an additional entry "From Master data (...)".

Grid

Click	Swipe	Views
Marks the entry as recipient of the e-mail		1. Table

Column definition

Name	Visible	Sort	Full Text	Explanation
Checkbox	Forced			
Title	Landscape			
Last name	Always	Ascending	Yes	
First name	Always		Yes	
E-Mail	Always		Yes	
Item	Hidden			
Department	Hidden			

Panel: Correspondence (email only)

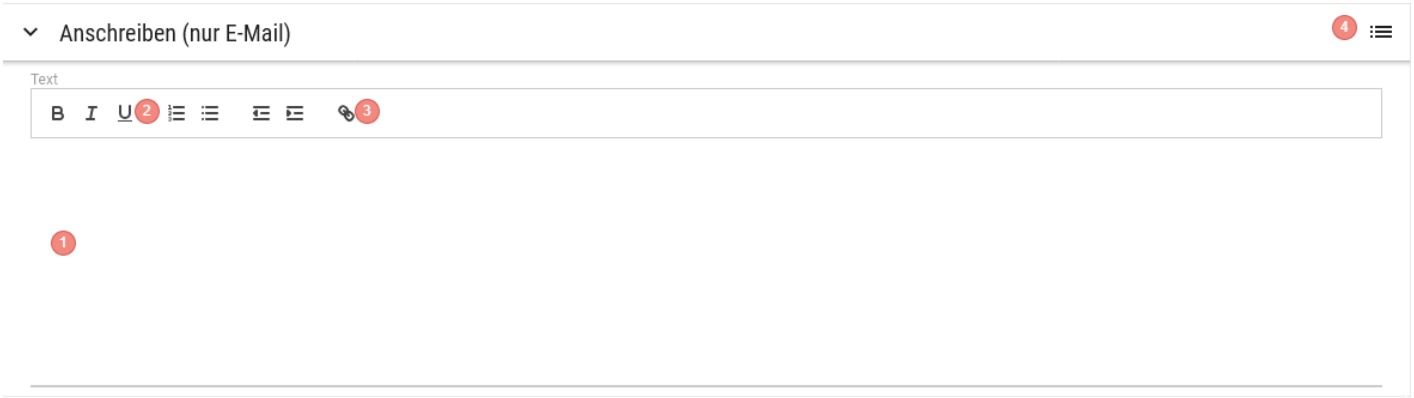
Enter a text here for the e-mail correspondence.

Texts entered here can be interpreted as HTML if it is valid HTML.



1. Predefined text blocks can be created via the backend code table "Order suggestion Text blocks", which can be accessed through the kebab menu in the panel. The defined text blocks can contain HTML formatting such as hyperlinks.

From version 21:



1. Text input with a formatting bar (WYSIWYG editor)
2. Bold, Italic, Underlined, numbered list, bullet list, decrease/increase indent
3. Icon to add hyperlinks
4. Order suggestion Text blocks, as before

Since version 21, a formatting bar (WYSIWYG editor) is available above the text input. The text no longer needs to be entered manually as HTML.

Grid Order suggestion Text blocks

Click	Swipe	Views
Marks the text block as e-mail correspondence		1. Table

Column definition

Name	Visible	Sort	Full Text	Explanation
Category	Forced			
Key	Landscape			
Culture	Always	Ascending		
Client	Always			
Value	Always		Yes	

Panel: Attachments

Since version 21, an additional panel is available below the Correspondence, through which documents can be selected as email attachments.

Grid

Click	Swipe	Views
Adds the document to the selection as an email attachment		1. Table

Column definition

Name	Visible	Sort	Full Text	Explanation
Checkbox	Forced			Tick the checkbox so that the additional attachment is added to the email.
Type	Always		Yes	"ORDER": documents additionally attached to the order suggestion can be uploaded here. "Employee": documents centrally provided to the employee via import
Path	Always		Yes	
File name	Always	Ascending	Yes	

Panel: Fax Recipient

Multiple selection is possible.

Conditions

The following recipients are displayed if a fax number is maintained:

1. Contacts of the active customer.
2. The own employee
3. Employees of type "Backoffice"
4. Employees of type "Dispatcher"
5. If the active customer has a fax number stored, the grid contains an additional entry "From Master data (...)".

Grid

Click	Swipe	Views

Marks the entry as recipient of the fax		1. Table

Column definition

Name	Visible	Sort	Full Text	Explanation
Checkbox	Forced			
Title	Landscape			
Last name	Always	Ascending	Yes	
First name	Always		Yes	
Fax	Always		Yes	
Item	Hidden			
Department	Hidden			

Action buttons

Name	Function	Visibility
Send	Sends the order suggestion to the e-mail addresses or fax devices of the selected recipients.	

FAQ

Where can I maintain the Text blocks for "Correspondence (email only)"?

You can maintain the texts in the code tables in the backend. The type is "Order suggestion Text blocks".

Why do I not see the Fax recipient section?

You need a corresponding fax server licence for this item to be visible.

Release

From version 21

1. WYSIWYG editor in the "Correspondence (email only)" panel including adding hyperlinks.
2. New "Attachments" panel for selecting documents (type "ORDER" or "Employee") as email attachments.

Revision #11
Created 2026-08-31 09:16:51 UTC by n8n
Updated 2026-10-31 02:23:37 UTC by n8n