Service Description Opportunities & Leads

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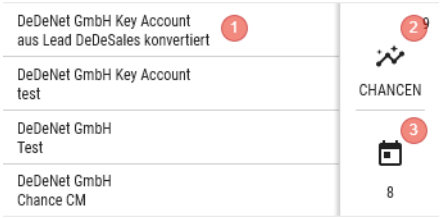
Opportunities

Opportunities

Title	Widget	Widget description
Opportunities		1. Open opportunities (only those where I am assigned as Person in charge) / all open opportunities Click: opens the summary page Available a. Customer details b. Start page dashboard
Opportunities		1. The next 4 open opportunities, sorted by "Expected closure" (ascending). (only those where I am assigned as Person in charge) Click switches to the opportunity Colour code: Red if the follow-up date has been exceeded 2. Number of open opportunities (total) (only those where I am assigned as Person in charge) Click opens the summary page 3. Number of open opportunities where the follow-up date has been exceeded. (only those where I am assigned as Person in charge) Click opens the summary page with filter on opportunities whose follow-up date has been exceeded Available a. Start page dashboard

General

Kebab menu (⋮)

Type	Menu item	Explanation

◉	In progress	
◉	Won	
◉	Lost	
◉	All	

✓	Only persons in charge	

Functions in the title bar

Icon	Explanation
+	Opens the customer search for selection of the customer for whom a new opportunity is to be created

Grid

Click	Swipe	Views
Detail page	1. Quotation (only if a quotation is assigned)	Shows all opportunities if entered from the cockpit, otherwise those where the customer from which one came is assigned to the opportunity.

Column definition

Name	Visible	Sort	Full Text	Explanation
Colour status	ForceVisible			Red: Follow-up date exceeded
Number	Hidden		Yes	
Name	Visible		Yes	
Employee	Hidden			
Main contact	Hidden		Yes	The contact of the master customer

Name	Visible	Sort	Full Text	Explanation
Created	VisibleOnlyLandscape			dd.mm.yyyy
Follow-up	Visible			dd.mm.yyyy
Priority	VisibleOnlyLandscape			
Level	Visible			
Sales process	Visible		Yes	
Closing opportunity	Hidden			% value
Expected closure	VisibleOnlyLandscape			dd.mm.yyyy
Status	VisibleOnlyLandscape			
Closing code	Hidden			
Sales type	Hidden			One-time | Month | Quarter | Year
Duration	Hidden			
One-off amount	VisibleOnlyLandscape			
Periodic amount	Hidden			
Total amount	Hidden			"One-off amount" + "Periodic amount" * Duration
Quotation	Hidden			The newest quotation of the opportunity
Last activity	Hidden			dd.mm.yyyy - hh:mm Shows the information of the last activity related to the customer
Last activity (text)	Hidden			Shows the information of the last activity related to the customer

Name	Visible	Sort	Full Text	Explanation
Attribute 1	Hidden			
Attribute 2	Hidden			
Attribute 3	Hidden			
Attribute 4	Hidden			
Attribute 5	Hidden			
Attribute 6	Hidden			
Attribute 7	Hidden			
Attribute 8	Hidden			
Attribute 9	Hidden			
Attribute 10	Hidden			
Campaign	Hidden			

Customer columns (only present if accessed via start dashboard.)

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	Visible	Sort	Full text	Explanation
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			
Terms of delivery	Hidden			

Name	Visible	Sort	Full text	Explanation
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	

FAQ

Release

Details

Title
Number Name

General

Kebab menu (⋮)

Type	Menu item	Explanation
	Request master data sheet	
	Close opportunity	only active if the opportunity is still In progress
	Customer	only visible if not accessed via the Customer masterdata
	----------	
	Quotations	
	Notes	
	Documents	
	Photos	
	CRM	
	Contacts	
	Activities	Green marking if the activity belongs to the opportunity

Type	Menu item	Explanation
	New activity	

Header

1. Switches to Customer details

additional widgets

(all kebab menu entries are also available as widgets)

1. Company
2. Involved
3. E-Mail — Sending an e-mail to the Contact based on a centrally stored template. From version 21.

Master data

1. Pencil
    a. Switches to Edit mode

Only possible if set via <Role> / LEAD MANAGEMENT / "Edit opportunities".

Field	Permission	Reference
Name		
Status		Display only, maintained in Completion
Person in charge		Dropdown of DeDeSales employees. When created, the current employee is automatically preselected, unless it is a test user.
Main contact		Dropdown of contacts of the master customer
E-mail		Display only
Phone		Display only
Mobile Phone		Display only
FOLLOW-UP		

Field	Permission	Reference
Priority		Code table: Opportunities priority
Stage		Code table: Opportunities stage
Sales process		Code table: Opportunities sales process
Expected closure [date]		
Sales type		One-off / Year / Month / Quarter
Duration	Leadsmanagement / Specify opportunity duration	Rename duration to the unit relevant for you, e.g. "Duration in months"
One-off amount		
Periodic amount		Rename period to the period relevant for you, e.g. monthly
Campaign		Order support - Campaign
Opportunities attribute 1		Basic configuration - Language - Enter translation - Opportunities attribute 1
Opportunities attribute 2		Basic configuration - Language - Enter translation - Opportunities attribute 2
Opportunities attribute 3		Basic configuration - Language - Enter translation- Opportunities attribute 3
Opportunities attribute 4		Basic configuration - Language - Enter translation- Opportunities attribute 4
Opportunities attribute 5		Basic configuration - Language - Enter translation- Opportunities attribute 5
Opportunities attribute 6		Basic configuration - Language - Enter translation- Opportunities attribute 6
Opportunities attribute 7		Basic configuration - Language - Enter translation- Opportunities attribute 7
Opportunities attribute 8		Basic configuration - Language - Enter translation- Opportunities attribute 8
Opportunities attribute 9		Basic configuration - Language - Enter translation- Opportunities attribute 9
Attribute10		Basic configuration - Language - Enter translation- Opportunities attribute10
Created		Display only

Edit mode

1. Action button "Save"
    a. Save is only possible if at least one customer exists
    b. Save is only possible if the mandatory fields are filled in:
    1. Name
    2. FOLLOW-UP
    3. Stage
    4. Sales process

FAQ

Release

Completion

Title	Widget	Widget Description
Completion		Only active if set via <Role> / LEAD MANAGEMENT / "Edit Opportunities".

Completion

Field	Right	Reference
Status		Won / Lost
Closing code		Code table: Opportunities Win Closing code / Opportunities Loss Closing code (Display depends on Status)
Closing date		

Action buttons

Name	Function	Visibility
Complete	Completes the Opportunity	When clicking on "Completion" in the Opportunity. Attention! If there is a CRM Form with the ID "CLOSE" it will be displayed. The completion is only executed when the form is also completed.

FAQ

Release

Company

Title	Widget	Widget Description
Company		1. Number of companies in this list Available: • Opportunities

General

Functions in the title bar

Icon	Explanation
+	Allows the creation of new companies Only possible if set via <Role> / LEAD MANAGEMENT / "Edit Opportunities".

Edit / Creation page

Fields

1. Role
   - Hidden if no Code table entries are available.
   - The first is selected if available.
   - Code table: Opportunities Partner role

2. Customer
   - No input field, only displays the Customer number if one is assigned
   - If no Customer is selected, the fields can be edited. Otherwise, they are read-only and filled automatically.

3. Name 1
4. Name 2
5. Name 3
6. Street
7. Postal code

8. Location
9. Country
10. Contact (Dropdown)
    - If no Customer is selected, an input field is shown instead.

Action buttons

Name	Function	Visibility
Save	Saves the company	Immediately when a Customer is created or edited
Assign customer		When a Customer is created and no reference exists yet
Unlink customer reference	Unlinks the company reference	When a Customer is edited

Grid

Click	Swipe	Views
Company	1. Display Only if there is a Number in the Customer master data. The Customer details page is displayed 2. Delete	1. Table

Column definition

Name	Visible	Sort	Full Text	Explanation
Role	Visible			COL - Partner role (Opportunities
Name 1	Visible	ASC	Yes	
Name 2	Hidden		Yes	
Name 3	Hidden			
Customer	VisibleOnlyLandscape		Yes	
Street	VisibleOnlyLandscape		Yes	
Postal code	VisibleOnlyLandscape		Yes	

Name	Visible	Sort	Full Text	Explanation
Location	Visible		Yes	
Country	Hidden			
Contact	VisibleOnlyLandscape		Yes	The selected contact

FAQ

Release

Involved

Title	Widget	Widget Description
Involved		1. Quantity of assigned Employees Available: • Opportunities

General

An Employee can be assigned to multiple Opportunities and an Opportunity can have multiple Employees.

Only possible if set via <Role> / LEAD MANAGEMENT / "Edit Opportunities".

Name	Function	Visibility
Link opportunity	Employee is linked to the Opportunity	if not yet linked
Unlink opportunity	Employee is unlinked from the Opportunity	if already linked

Grid

Click	Swipe	Views
responsible	1. Link opportunity 2. Unlink opportunity	1. Table

Column definition

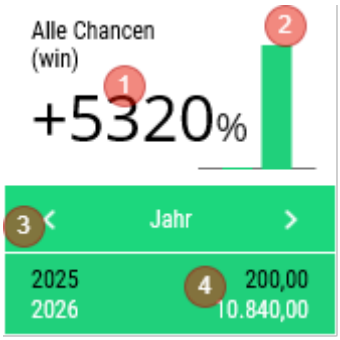
Name	Visible	Sort	Full Text	Description
	ForceVisible			Employee was Assigned to the Opportunity

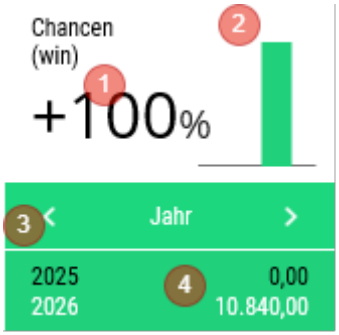
FAQ

Release

STATISTICS

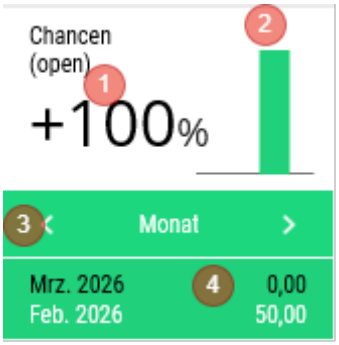
Opportunities (win)

Title	Widget	Widget Description
All Opportunities (win)		1. Change in % 2. Change graphically 3. Switch display variants "Month" | "Month / Previous year" | "Year" | "KEY DATE" | "Financial year". 4. Display of the concrete numbers based on the selection from 3. Available: • Homepage dashboard Click: • Switches to the detail view Widget colouring: • red: fewer opportunities won in the observation period • green: more opportunities won in the observation period The data refers to all won opportunities available on the device.

Title	Widget	Widget Description
Opportunities (win)		1. Change in % 2. Change graphically 3. Switch display variants "Month" | "Month / Previous year" | "Year" | "KEY DATE" | "Financial year" 4. Display of the concrete numbers based on the selection from 3. Available: • Homepage dashboard Click: • Switches to the detail view Widget colouring: • red: fewer opportunities won in the observation period • green: more opportunities won in the observation period The data refers to all won opportunities assigned to you as responsible or involved Employee.

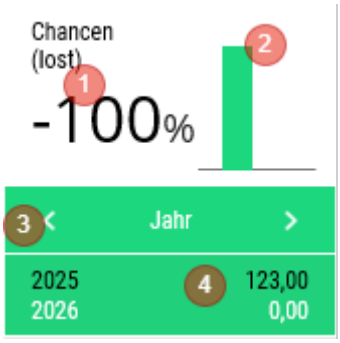
Opportunities (open)

Title	Widget	Widget Description

All Opportunities (open)		1. Change in % 2. Change graphically 3. Switch display variants "Month" | "Month / Previous year" | "Year" | "Financial year" 4. Display of the concrete numbers based on the selection from 3. Available: • Homepage dashboard Click: • Switches to the detail view Widget colouring: • red: fewer opportunities open in the observation period • green: more opportunities open in the observation period The data refers to all won opportunities available on the device.
Opportunities (open)		1. Change in % 2. Change graphically 3. Switch display variants "Month" | "Month / Previous year" | "Year" | "Financial year" 4. Display of the concrete numbers based on the selection from 3. Available: • Homepage dashboard Click: • Switches to the detail view Widget colouring: • red: fewer opportunities won in the observation period • green: more opportunities won in the observation period The data refers to all won opportunities assigned to you as responsible or involved Employee.

Opportunities (lost)

Title	Widget	Widget Description
All Opportunities (lost)		1. Change in % 2. Change graphically 3. Switch display variants "Month" | "Month / Previous year" | "Year" | "KEY DATE" | "Financial year" 4. Display of the concrete numbers based on the selection from 3. Available: • Homepage dashboard Click: • Switches to the detail view Widget colouring: • green: fewer lost opportunities in the observation period • red: more lost opportunities in the observation period The data refers to all lost opportunities available on the device.

Title	Widget	Widget Description
Opportunities (lost)		1. Change in % 2. Change graphically 3. Switch display variants "Month" | "Month / Previous year" | "Year" | "KEY DATE" | "Financial year" 4. Display of the concrete numbers based on the selection from 3. Available: • Homepage dashboard Click: • Switches to the detail view Widget colouring: • green: fewer lost opportunities in the observation period • red: more lost opportunities in the observation period The data refers to all lost opportunities assigned to you as responsible or involved Employee.

General

Kebab menu (⋮)

Type	Menu item	Explanation
◉	Year	
◉	Financial year	only visible if Financial year <> Year
◉	KEY DATE	

	Export	

{{DDN-2@282#bkmrk-header}}

Grid

Click	Swipe	Views
	1. By swiping you reach the Document view with a preset filter. 2. There are 3 swipe selections Opportunities <Current year> Opportunities <Previous year> Opportunities <Year before last>	1. Table

{{DDN-2@282#bkmrk-filter}}

Special feature in the filter for completed opportunities:

The filter can be extended to the Closing code

Special feature in the filter for opportunities In progress:

The filter can be extended to the Level

FAQ

Release

Leads

Leads

Title	Widget	Widget Description
Leads		1. Released and within validity period Click opens the summary page Available • Homepage dashboard • Customer details
Leads		1. The next 4 open leads (In progress and not expired), sorted by "Valid until" (Ascending) Click switches to the lead Colour code: Red: Valid until is already tomorrow. Yellow: Valid until is within the next 7 days 2. Number of valid leads (Released and within validity period) Click opens the summary page 3. Number of new leads since the last transfer Click opens the summary page, but shows only new leads since the last transfer Available a. Cockpit

General

Grid

Lists all leads (Released and within validity period)

Click	Swipe	Views
On dashboard: Summary page Lead definitions		1. Table
In customer details: Summary page Customer leads		1. Table

Column definition dashboard

Name	Visible	Sort	Full Text	Explanation
Name	Visible	ASC	Yes	Name of the job
Campaign	VisibleOnlyLandscape		Yes	
Valid from	VisibleOnlyLandscape			
Valid until	VisibleOnlyLandscape			
MQL	Visible			No. of customers who are Non-completed or In progress.
SQL	Visible			No. of customers who have status "Sales-qualified lead".
Converted	Visible			No. of customers who have status Converted.
Total	Hidden			
Non-completed	Hidden			
Deferred	Hidden			
No lead	Hidden			
In progress	Hidden			

FAQ

Release

Overview Page Lead Definitions

Title: Name of the lead

Kebab menu (⋮)

Type	Menu item	Explanation
✓	Show converted	Extends the overview to leads with the Lead status "Converted" when active
✓	Show no lead	Extends the overview to leads with the Lead status "No lead" when active

Grid

- Contains only leads that are not set to "No lead" or "Converted".
- Last time the job was processed for the customer

Click	Swipe	Views
Detail page	Convert	1st table

Column definition

Name	Visible	Sort	Full Text	Explanation

Colour code	ForceVisible			Green: Purple: Key account (from version 8) Blue: Prospect / Transfer customer Red: Delivery block Not assigned: orange 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.
Lead status	Visible			
Created by	Visible			From version 19
Qualification	Hidden			Everything that does not have the status "Sales-qualified lead" is MQL, otherwise SQL.
Last activity	Visible			dd.mm.yyyy hh:mm when the last activity for this lead occurred.
FOLLOW-UP	Visible			From version 19

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	

Customer Leads Overview Page

Lists all open leads of the customer

Title: Leads

Functions in the title bar

Icon	Explanation
+	Adds the customer to another lead definition

Grid

Click	Swipe	Views
Detail page		1st table

Column Definition

Name	Visible	Sort	Full Text	Explanation
Lead Status	Visible			
Lead	Visible			Name of the lead definition
Created by	Visible			From version 19

Name	Visible	Sort	Full Text	Explanation
Qualification	Hidden			Everything that does not have the status "Sales-qualified lead" is MQL, otherwise SQL.
Last activity	Visible			dd.mm.yyyy hh:mm when the last activity for this lead took place.
FOLLOW-UP	Visible			From version 19

Detail page

Title
Lead <Leadname>

General

Kebab menu (⋮)

Type	Menu item	Explanation
	Convert into an opportunity	Requires the right: Convert lead into opportunity. Only active if the lead has not yet been converted
	Reset status	Only active when you are in a converted lead
	CRM	Requires the task module

Header

1. Edit mode

- Follow-up date must not be in the past
- Follow-up date must not be after the end date of the lead list. If there is no end date, the check is omitted.
- Person in charge selectable via dropdown list, provided it is not a test user
- Apply button saves the changes to the lead

Widgets

Activities

- Opens the activities. All activities from the lead are marked in green, all other activities belong to the customer but not to the lead.
- When creating a new activity, it is automatically assigned to the lead.

New activity (Icon: **+**)

- Opens the form to create a new activity.
- This activity is automatically assigned to the lead.

Form

- Opens the form that belongs to the lead.

Lead status

- Opens a window (like a dropdown) with the following options
  - Non-completed
  - In progress
  - Deferred
  - Sales-qualified lead
    - E-mail subscription: Lead status Sales-qualified lead
  - No lead
- The lead status is automatically changed from Non-completed to In progress when one of the following events occurs:
  - The form is saved.
  - A new activity is created.
  - The follow-up date is saved.
- If the lead status is set to one of the following values, the lead form is automatically displayed, if available
  - Deferred
  - In progress
  - Non-completed
- If a lead has been converted and the status is then reset, the status cannot be set to converted again. In this case, "Converted" is provided in the status selection.

Documents

- Opens a window where files can be assigned to the lead.

E-Mail

- Opens the E-Mail widget to send an E-Mail to the Contact based on a centrally stored template. From version 21 onwards.

Hierarchy

- If the "Key account" module is licensed, it is possible to access the Customer hierarchy .

Contacts

- (A contact can be assigned to multiple leads and a lead can have multiple contacts; all contacts of the customer are displayed.)
- Top right: {number assigned}/{total contacts}
  - If a new contact is created, it is automatically assigned to the lead.
  - Action buttons on the contact detail page, only available if accessed via lead.
    - Link lead (if not yet linked)
    - Unlink lead (if already linked)
- Contact grid:
  - Swipe to "Link lead" or "Unlink lead".
  - Lead column: Shows whether the contact is already linked with the lead

Master data

1. Edit

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

Field	Reference	Editable	Display in customer change e-mail
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.		
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		

Field	Reference	Editable	Display in customer change e-mail
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.		
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.		

Field	Reference	Editable	Display in customer change e-mail
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.		
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.		

Field	Reference	Editable	Display in customer change e-mail
Parent customer	Only visible if available and Key account module licensed		
Currency	Only visible if available.		
Managed by	Only visible if available.		

Convert

When converting, a lead is turned into an opportunity.
Opens the page to create a new opportunity for the customer/prospect.
Upon successful creation of the opportunity:

- Saves the resulting opportunity in the lead.
- Saves the lead from which the opportunity originated in the opportunity.
- Changes the status of the lead for the customer/prospect to "Converted"

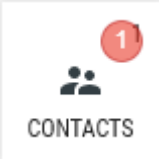
FAQ

Why do I not see a certain employee in the selection "Person in charge"?

Only employees who do not have the "Test user" flag active in the backend are shown in the list.

Release

Contacts

Title	Widget	Widget Description
Contacts		1. Number of contacts Available: • Customer details • Opportunities

{{DDN-01@266#bkmrk-titel-icons}}

Grid

Click	Swipe	Views
Contact details		1. Table

Action buttons

Name	Function	Visibility
Link lead/Opportunity	Contact is linked with the Opportunity / the Lead	if not yet linked
Unlink lead/Opportunity	Contact is unlinked from the Opportunity / the Lead	if already linked

Column definition

Name	Visible	Sort	Full Text	Explanation
	ForceVisible			Contact was assigned

Name	Visible	Sort	Full Text	Explanation

Colour code	ForceVisible			Red: Has left the company Green: Main contact Red has a higher priority, i.e. a main contact who has left the company is shown in red.
Title	Visible			
Last name	Visible	ASC	Yes	
First name	Visible		Yes	
Item	VisibleOnlyLandscape			
E-Mail	Hidden		Yes	Full text search is only active if there is an @ in the search term.
Telephone	Hidden		Yes	
Mobile communication	Hidden		Yes	
Fax	Hidden			
Department	Hidden			
Function	Hidden			
Advertising material	Hidden			
Item free text	Hidden			
Has left the company	Hidden			
Main contact	Hidden			

FAQ

Release

E-Mail

Title
E-Mail

General

The "E-Mail" widget allows you to send an e-mail directly from an opportunity or a lead to the contact, based on a centrally stored e-mail template. Available since version 21.

How to create an e-mail template can be found under Settings - E-Mail Templates (Opportunities & Leads).

Panel: E-Mail Recipient

Multiple selection is possible.

Conditions

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

1. Main contact of the opportunity/lead — preselected if available
2. The own employee
3. If an e-mail address is stored for the customer, 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			

Name	Visible	Sort	Full Text	Explanation
Last name	Always	Ascending	Yes	
First name	Always		Yes	
E-mail	Always		Yes	

Panel: Template

Dropdown selection of the e-mail templates enabled for this opportunity/lead. Selecting a template automatically fills in subject, text and attachments.

Panel: Subject

Pre-filled from the selected template, freely editable.

Panel: Text

Formatting bar (WYSIWYG editor): Bold, Italic, Underlined, numbered list, bullet list, decrease/increase indent as well as an icon to insert hyperlinks. Pre-filled from the selected template, freely editable.

Panel: Attachments

Grid

Click	Swipe	Views
Marks/removes the attachment for sending		1. Table

Column definition

Name	Visible	Sort	Full Text	Explanation
Checkbox	Forced			
Type	Always		Yes	"Template": attachment pre-filled from the selected e-mail template in the backend. Additional documents can be added via "+".

Name	Visible	Sort	Full Text	Explanation
File name	Always	Ascending	Yes	

Action buttons

Name	Function	Visibility
Send	Sends the e-mail with subject, text and the marked attachments to the contact. An activity is automatically created in the process.	

Release

From version 21

1. New widget "E-Mail" for opportunities and leads: sending e-mails based on centrally stored templates including pre-filled and additional attachments.