

Company

Title	Widget	Widget Description
Company		<p>1. Number of companies in this list</p> <p>Available:</p> <ul style="list-style-type: none">• 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	<ol style="list-style-type: none">1. Display Only if there is a Number in the Customer master data. The Customer details page is displayed2. Delete	<ol style="list-style-type: none">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	
Location	Visible		Yes	

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

FAQ

Release

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