

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

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WIEDERVORLAGE 21.05.2025				

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

STAMMDATEN



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
E-mail	Only visible if available. Clickable to open a new e-mail in the default e-mail client.	x	x

Field	Reference	Editable	Display in customer change e-mail
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		
Street	Only visible if available.	x	x
Postal code	Only visible if available.	x	x

Field	Reference	Editable	Display in customer change e-mail
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.		
Customer group	Only visible if available.		
Discount group	Only visible if available.		

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

Field	Reference	Editable	Display in customer change e-mail
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

Revision #11

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