

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
	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		
Priority		Code table: Opportunities priority
Stage		Code table: Opportunities stage
Sales process		Code table: Opportunities sales process

Field	Permission	Reference
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

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