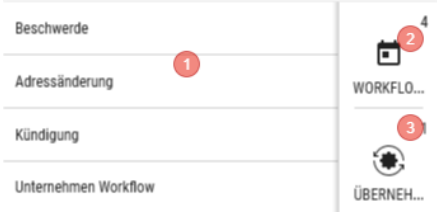


Workflow Summary

Title	Widget	Widget Description
Workflow		<p>1. Number of open workflows</p> <p>Colour code: The corner turns yellow if you are the owner of an open workflow.</p> <p>Click: opens the summary page</p> <p>Available</p> <ul style="list-style-type: none"> • Customer details • Start page dashboard
Workflow Listing		<p>1. The next 4 open entries, sorted by next FOLLOW-UP date Ascending</p> <p>Colour code: Red: if the processing period has been exceeded (next day) Yellow: if the processing must take place Today</p> <p>Click: switches to the workflow</p> <p>2. Number of my workflows for which I am currently responsible.</p> <p>Click: switches to the workflows</p> <p>3. Number of workflows I could take over but have not yet taken over.</p> <p>Click: switches to the workflows</p> <p>Available:</p> <ul style="list-style-type: none"> • Start page dashboard

Grid

Click	Swipe	Views
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Workflow		1. Table
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Column definition

Name	Visible	Sort	Full Text	Explanation
Colour code	ForceVisible			Green, if approved Red, if rejected Yellow, if you are the owner yourself
Workflow	Visible		Yes	The name of the workflow
Entered on	Visible	DESC		
Created by	Hidden			
Step	Hidden			
Step started	Hidden			
Owner	VisibleOnlyLandscape			
Status	Visible			
Reason	Hidden			
Due on	VisibleOnlyLandscape			

Customer columns (when accessed via Start page dashboard)

Name	Visible	Sort	Full text	Explanation
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Colour code	Forced			<p>Purple: Key account Blue: Prospect, transfer customer, new customer Red: Delivery block Orange: Not assigned</p> <p>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.</p>
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			<p>The text for this column is determined as follows:</p> <p>No invoice discount: no visiting frequency present in the customer master data</p> <p>No visit: no last visit present</p> <p>Not due: Last visit + visiting frequency > current calendar week</p> <p>Now: Last visit + visiting frequency == current calendar week</p> <p>Overdue (1): Last visit + visiting frequency < current calendar week</p> <p>Overdue (2): Last visit + (visiting frequency * 2) <= current calendar week</p>
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	

FAQ

Release