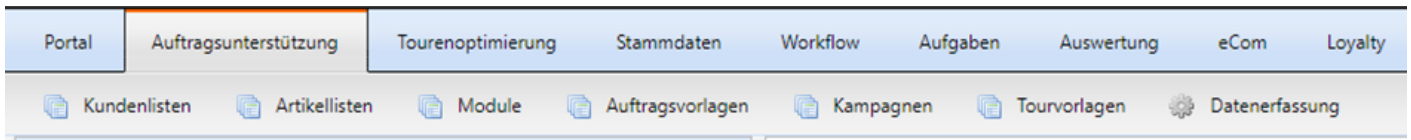


Order support menu in the backend

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Basics and Use of Order support



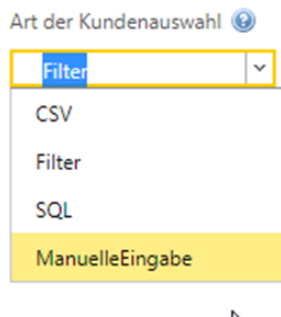
Usage

In the overview, you can see the data that you can create in the Order support and how/where it is to be used.

Menu	Explanation	Usage in
Data collection	Here you can import various data into the DeDeSales system. These include Activities, Stocktaking notes, Annual budget, Annual agreement, Clients - Customer number relationships, Notes on hierarchy nodes, Plan figures and price data. Individual Excel files can also be provided.	Statistics Clients

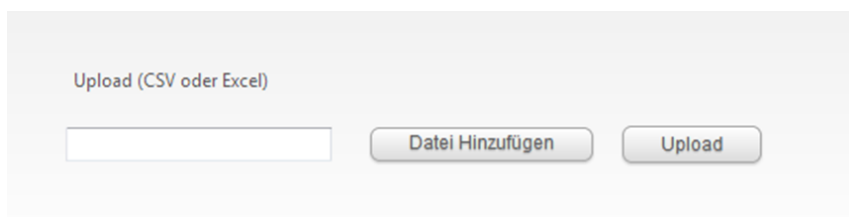
Type of selection

The selection of customers/items or similar is always done the same way and is explained here using the example of a Customer list.



CSV: static

1. First, create a corresponding file that contains the information you want.
 2. After selecting CSV in the Customer selection, press the "Weiter" button in the Assistant
- The following assistance step appears:

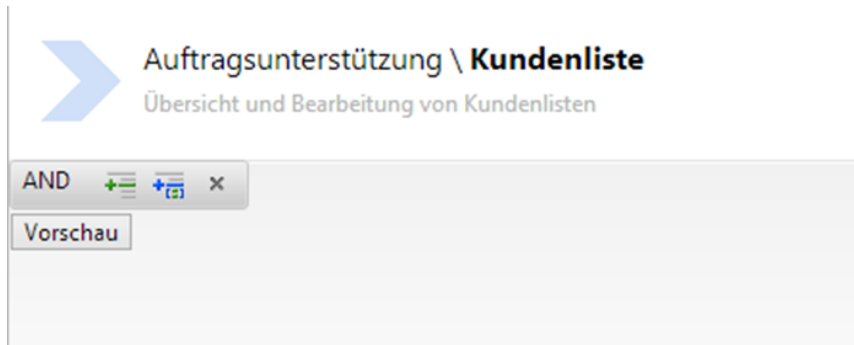


3. Select the file created in step 1 from the local PC using the "Datei Hinzufügen" button
4. Press the "Upload" button
5. In the Assistant, press the "Speichern/Vorgang beenden" button.

Filter: dynamic

Simple filtering

Below you see the filter after you have created a new Customer list (or also Item list). So far, nothing is filtered and the system is waiting for your filter criteria.



First, click on the icon to add an "expression". A new filter row is displayed, divided into three parts:



1. The table column to be filtered (currently "AbcKennung" is shown). To select another field, click on the word "AbcKennung" and all available fields will be displayed alphabetically. These can be selected by clicking.
2. The condition to be checked (currently "EqualTo", i.e. the content in field 3 must be equal to the field from 1, otherwise there is no result)

Filter	Explanation	Inverse function
Contains	Checks whether the entered string occurs in the table column.	DoesNotContain
StartsWith	Checks whether the table column starts with the entered string	EndsWith
EqualTo	Checks whether the table column matches the entered string	NotEqualTo
GreaterThan	Greater than, used only for numbers	LessThan
GreaterThanOrEqualTo	Greater or equal, used only for numbers	LessThanOrEqualTo

Filter	Explanation	Inverse function
Between	Checks whether the table column is between two values	NotBetween
IsEmpty	Checks whether the table column is empty	NotIsEmpty

3. An input field whose value is used to check the table column with the condition

Task: We want to filter all customers who have the text Media in the field Name1.

First, we click on the table column and select the column "Name1". Next, we change the condition to "Contains" and finally enter the text "Media" in the input field. Your filter row should now look like this:



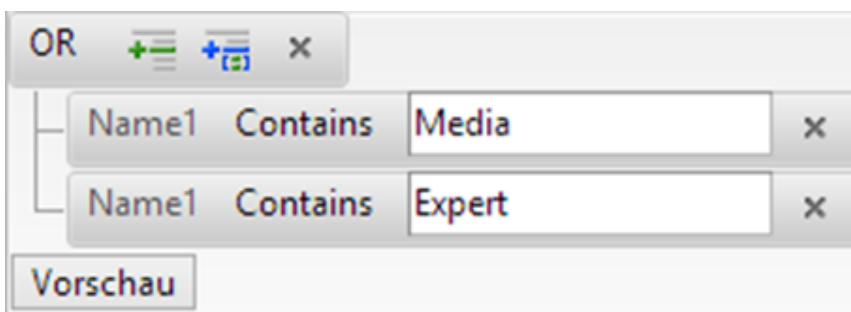
Now click the Preview button to display the filtered result.

Task: We want to extend the filter because we want to see all customers who have Media in Name1 and all customers who have Expert in the name.

The first thing we need to do now is to analyse the task. A database server requires a filter somewhat differently than most people imagine. When we say in the task that we want these and those customers, it means for the database server that it should filter all customers who have either "Media" OR "Expert" in the name.

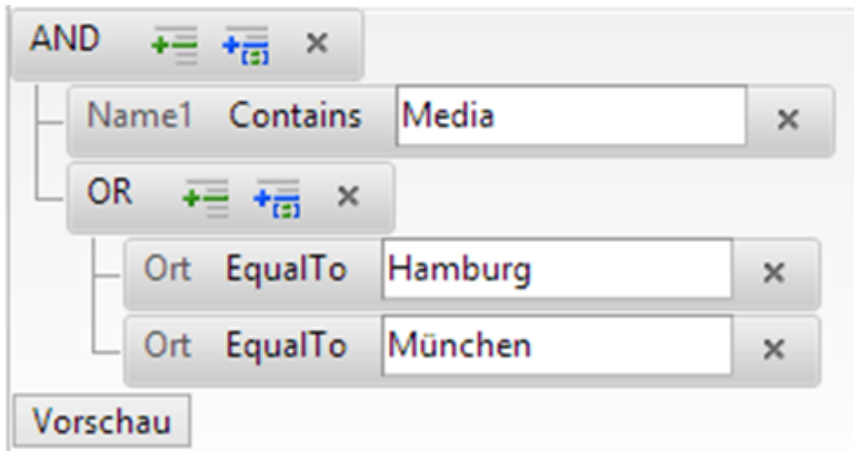
To achieve this, we first need to change the connection of two filter rows. This is set to AND (= AND connection) by default and must now be changed to OR (= OR connection).

Then click the button again to add a new filter row and make the settings according to the task. The result should then look like this.



Complex filtering

Task: Show me all customers who have the term Media in the table column Name1, but only the customers who are located in Hamburg or Munich.



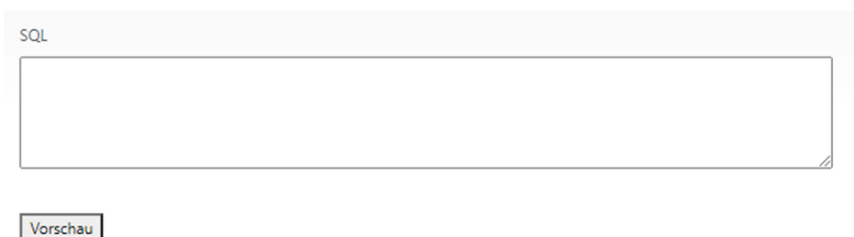
The screenshot shows a filtering interface with a tree structure. At the top is a box labeled 'AND' with a plus icon, a minus icon, a plus icon with a table symbol, and a close 'x' icon. Below this, a filter row is expanded, showing 'Name1' followed by 'Contains' and a text input field containing 'Media', with a close 'x' icon. Below the filter row is a box labeled 'OR' with similar icons. Under the 'OR' box, two filter rows are listed: 'Ort' followed by 'EqualTo' and a text input field containing 'Hamburg', and 'Ort' followed by 'EqualTo' and a text input field containing 'München'. Each of these two rows has a close 'x' icon. At the bottom left of the interface is a button labeled 'Vorschau'.

First, we see that there is an AND connection between a filter row (table column Name1) and another connection row (starting with OR).

After the second connection, there are two filter rows linked with OR and a check on the table column Location takes place.

SQL: dynamic

1. After selecting SQL in the Customer selection, press the "Weiter" button in the Assistant
The following assistance step appears:



The screenshot shows a form for the 'SQL' step. It has a label 'SQL' in the top left corner. Below the label is a large, empty text input field with a small cursor icon at the bottom right. At the bottom left of the form is a button labeled 'Vorschau'.

2. Here you write your SQL statement and press Preview to see the results.
3. In the Assistant, press the "Speichern/Vorgang beenden" button.

Manual input: static

1. After selecting Manual input in the Customer selection, press the "Weiter" button in the Assistant
The following assistance step appears:



Kunden

10001
10002

2. Here you write your Customer numbers that should be included in the Customer list
Multiple Customer numbers are written one below the other separated by ENTER.
3. In the Assistant, press the "Speichern/Vorgang beenden" button.

WARNING: The difference between dynamic and static methods is that the dynamic methods are applied again every night by the Total import and thus possibly take into account changes from the ERP system (e.g. New customers). The static method is a snapshot at the time the Customer list was created.

Status

In progress

The data is not passed on to devices or shown in dependencies.

Released

The data is passed on to devices and dependencies.

Completed

The data is no longer passed on to devices or dependencies.

Deleted

The data is not passed on to devices or dependencies, but the list remains in the backend.

Customer lists

This is a customer group defined by you. Depending on the licence, order templates, tasks, CRM, representations, and trade fairs can be made available to this customer group.

 Neue Kundenliste anlegen		
Name	Anz. Kunden	Erstellt am
Alle außer 10001	9912	23.09.2020
Außer 11025	9912	01.02.2021
Nur 10001	1	26.10.2016
Nur 10001 und 10002	2	18.09.2020
Nur 10002	1	26.10.2016

You have the option to modify an existing customer list by clicking on it.

You create a new customer list using the green plus button above the table.

If you want the customer list to also be available in the client, then check the corresponding box when creating the list.

Filter customer list by other customer lists

Filtered customer lists can be based on other customer lists. When linking with a customer list, it must be restricted to it. The only practically relevant filter type is NotIsEmpty

Item lists

An item list contains a number of items defined by you, which is used in the order templates.

+ Neue Artikelliste anlegen			
Name	Anz. Artikel	Erstellt am	Erst
Alle Artikel	14723	15.01.2020 09:15:36	adm
Artikel mit DeDe	7	29.01.2021 10:27:50	ded
CSV	936	17.08.2020 09:06:48	ded

You have the option to modify an existing item list by clicking on it. You can create a new item list using the green plus button above the table.

In addition to the described differences between the selection options, there is another special feature for item lists:

With a CSV import, three additional fields can be imported, which are, for example, displayed in the order templates. These fields are static and then apply equally to all customers for whom this item list/order template is displayed. Such fields could, for example, contain a page number, max. discount, or similar.

When selecting CSV, you can specify the headings of the 3 additional columns to be displayed:

Zusatzspalte 1 ⓘ

Zusatzspalte 2 ⓘ

Zusatzspalte 3 ⓘ

After uploading the file, you must specify in which table (Excel sheet) and in which column the item numbers and additional information are located.

Spalte der ersten Zusatzinformation ?

Column2 (B) ▼

Spalte der zweiten Zusatzinformation ?

Column3 (C) ▼

Spalte der dritten Zusatzinformation ?

keine ▼

Spalte des Farbcodes ?

Column4 (D) ▼

	A	B	C	D
1	Artikelnumm	Katalogseite	Maximalraba	Farbcode
2	10000	100	10%	rot
3	10001	57	5%	gelb
4	10002	50	7%	grün
5	10003	68	3%	blau

The order of the uploaded items is retained in the client.

Modules

Modules are the ideal addition to Order templates. A module is capable of enriching the items of an Order template with customer-related data for a selected period.

+ Neues Modul anlegen		
Name	Bearbeitungsdatum	Status
Auftragsbestand 2017	05.04.2017 15:51:50	Freigegeben
Bedarf 2016	17.06.2021 12:14:01	Freigegeben

You have the option to modify an existing module by clicking on it. You can create a new module using the green plus button above the table.

The following modules are currently available:

Demand

The Demand module determines the invoiced quantities of the item within the specified period (Start date + End date). You use this module to display in the Item list / Order template how many pieces of this item the customer has already purchased. The sales force can use this information as a basis for decision-making.

Best-price

The Best-price module determines the best price within the specified period (Start date + End date). The sales force can use this information to avoid accidentally offering a higher price in a promotion than the customer has previously received.

Benchmark items

Determines the invoiced quantity within the period specified by Start date and End date for all items that are located in Additional column 1 of the Item list.

Last Delivery date

Displays in the Order template the last Delivery date of all Orders of the customer within the selected period of the module.

Last Billing date

Displays in the Order template the last Billing date of all Invoices of the customer within the selected period of the module.

Last Delivery

Displays in the Order template the last Delivery of all Orders of the customer within the selected period of the module.

Last Order quantity

Determines for each Item from the order documents the last ordered quantity. For each item, the respective last Order applies.

Back Order

Displays in the Order template the Back Order of the item for the customer within the selected period of the module.

Order templates - AVO

An order template is a list that can be called up within an order in the DeDeSales client. The employee receives an overview of the items (item list) contained in the order template, enriched with customer-specific data (modules). The employee is able to order directly from the order template.

Used for example for

- Customer actions/activities
- Promotions
- New products
- Listing statuses
- Shelf modules
- Sales promotion
- eCom container

An order template combines data from customer lists, item lists and modules. All together this forms an order template.

+ Neue Auftragsvorlage anlegen			
Name	Ersteller	Erstellt am	Gültig
Alle Artikel	admin	15.01.2020 09:37:31	
Artikel mit erhöhter VE	admin	15.01.2020 09:38:46	

You have the option to modify an existing order template (AVO) by clicking on it. You create a new order template via the green plus button above the table.

The following special features apply to an order template:

1. An order template is only shown for the customers who are present in the customer list.
2. An order template contains only the items that are present in the item list.
3. If entries of the type "Order template categories" are stored via code lists, then the order templates are displayed categorised in the client.
4. An order template can apply to different clients.

5. An order template can be enriched with customer-related data through up to four modules.
6. You can specify that during a visit all items of the order template are automatically transferred into an order.
7. You can assign different validity periods to order templates, from when they are automatically Visible in the client or should be Hidden.
8. You can link order templates to specific types of orders, e.g. only to orders or complaints.
9. You can give an order template a preset discount.
10. You can add an internal text to the order template.
11. An order template can be called up in the DeDeSales client, for example in order entry.

Campaigns

Campaigns can be selected during the Conclusion of order. By evaluating the orders of a campaign, it can be assessed whether it was successful or not. For example, it is used in the Type Trade fair, Promotions, events.

A campaign is, for example, a trade fair promotion, advertising, mailing campaign or similar. If a campaign is created and the validity period applies, the employee is able to select the campaign to which an order was documented during the Conclusion of order.

If this has been agreed with you, the ID of the campaign will also be transferred to your ERP system. In this case, it is necessary that the ID you enter is known at the appropriate place in the ERP system.

 Neue Kampagne anlegen				
ID	Name	Beginn	Ende	Status
K1	Kampagne 1			Freigegeben

You have the option to modify an existing campaign by clicking on it. You can create a new campaign using the green plus button above the table.

Please note that you can only work with Customer lists in the campaigns.

Through the campaign, you have the possibility to determine success or failure based on incoming orders.

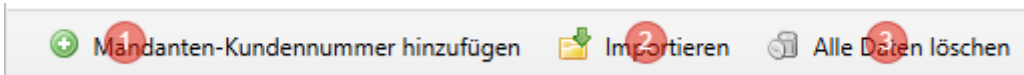
Data collection

Here you can import various data into the DeDeSales system. This includes Activities, Stocktaking notes, Notes, etc. You can also provide individual Excel files.



Here you can add or delete the corresponding data. You click on the desired menu and in most cases have a summary of the data already available.

In the individual sections, you can either add single entries or add multiple data records. Furthermore, you can delete data.



1. The plus adds single data records

2. Import gives you the possibility to add multiple data records at once. Here you download an empty template in the Assistant, fill it out and then add it again.

For menu entries where you cannot add single data records, you go directly to the Import page with the templates.

Please note that to complete the upload you must perform the Assistant step "Import".

3. Delete all data deletes all current data from the database.

After each change, a total import must run so that the data becomes visible in the client.

Data collection - Target agreement

Create the Target agreement in the backend under Order support / Data collection / Target agreement.

You have the option to download an Excel file and upload it again after filling it out.

You can create individual records via the "Add Target agreement" button.

With pseudo-customers for your sales reps, you set per month how much turnover the Sales rep. must achieve.

You can also store the Target agreement at the customer level, then you specify how much the customer must have reached in which month.

The Target agreements can be found again in the client on the Target/Actual widget.

Tour template

In combination with Start year, Visiting frequency, etc., you can create days here on which a customer visit is to be suggested. See also [Tour suggestion](#)