

Backend Tasks & CRM

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Difference between Tasks / CRM

Tasks

Tasks are hidden after saving.

Under certain circumstances (setting in the backend) they can also be performed more frequently.

Each completed task results in its own data record

CRM

CRM can be created for Customers, Contacts, New customers, etc.

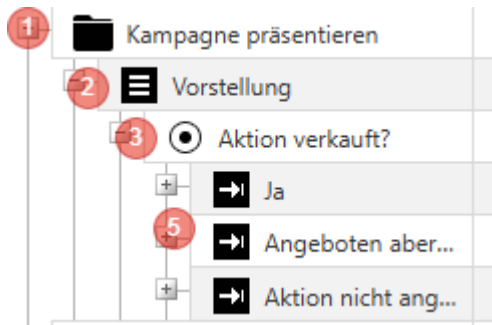
The data is not hidden after saving, i.e. the previous values are still displayed and can be changed / supplemented.

A CRM creates a data record that is continuously maintained.

Create Tasks

Summary

Jobs and CRM queries consist of several parts, which are explained below and are the same in both cases. You add another level by right-clicking on the previous level.



Level	Explanation	General Information
1	This is the head and the name of the job. In addition, a customer list defines which customer this job is assigned to and in which period the job is visible.	Create is Mandatory!
2	This is a page within the job. Especially complex jobs can be divided into several pages to maintain clarity.	At least one page is Mandatory!
3	This is the question level. Here you specify what the employee has to do and how the information should be queried. Options include single choice, multiple choice, input fields, etc.	
4	This is the reply level. The reply level is not always available, but only for questions of the type "Single Choice", "Multiple Choice" or "Dropdown". The reply level contains the available reply options.	Only possible for certain questions, e.g. DropDown or SingleChoice

5	<p>(not shown here)</p> <p>Below level 4, you can insert another level (page) by right-clicking. This page is only displayed if the employee has previously selected the reply from level 4. This allows you to ask further questions based on a reply selection.</p>	
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Create Tasks

Level 1 - Creating a Job



Aufgaben \ **Anlegen**

Übersicht und Bearbeitung

Name 

1

Priorität 

2 

Gültig ab 



3

Gültig bis 



Status 

4 

ID 

5

6 ☒ Daten nur kundenbasiert speichern 

Kunden

7 

8 ☒ Wiederverwendbar 

9 ☐ Reports generieren

10 ☐ Wie Besuchsrhythmus 

Wochenrhythmus 

11

Reportdatei

12

Datei Hinzufügen

Upload

1. Name

Assign a meaningful name; ideally, the Sales rep. can already tell from the name what they need to do.

2. Priority

Priorities can be set for jobs. This is not necessary in the CRM area, as the data record is always available.

Priority	General Information	Usage	Colour code in Client
Priority A		High turnover chance in customer campaigns. Must definitely be presented.	red
Priority B		Standard jobs	orange
Priority C		Additional jobs	none
Priority Z	This job MUST be closed at the next visit. Without completion of the job, no Visit conclusion is possible!	Only for truly critical cases, e.g. product recall.	dark red

3. Validity period

If desired, set a period for which the job or CRM should be available. If no restriction of validity is wanted, the fields can be left empty.

In the jobs area, these become mandatory fields if you want to make the job Reusable.

Validation

The until date must be later than the start date

4. Status

Status	General Information
In progress	The job is still being created; no data can be collected via the Client yet, as it does not appear there yet
Released	The job has been activated for data collection on the Client
Completed	The job has been completed; the data can be further evaluated in the backend but can no longer be edited in the Client

Deleted	The job is deleted and no longer available for any evaluations in the backend
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5. ID

For evaluation of data in the backend, each job needs an ID. Please observe the restrictions: no umlauts may be used and the ID must begin with a letter.

6. Reply storage (jobs only)

If you have customers assigned to multiple Employees, you can use this selection to control whether all Employees should perform the job or only one.

Customer-based – activated: Everyone receives the job with the same data status.

Customer-based – deactivated: each Employee works on their own data status

In the CRM area, this is called "Non-business" and only the Employee who handled this customer can see and modify the data record if the box is checked.

7. Customer list

Select via the Dropdown list for which Customers the job should be made available. If it concerns only certain Customers, create an appropriate Customer list beforehand.

8. Reusable (jobs only)

Employees can perform the job multiple times for a Customer. A separate data record is created for each activation of the job. Reusable jobs require a validity period (see point 3)

9. Generate reports

To have the option to perform an evaluation of the data in the backend, the checkbox must be ticked and an ID must be provided (see point 5).

10. Visiting frequency (jobs only)

With this tick box, you can specify for Reusable jobs whether they should be processed according to the Customer's visiting frequency.

11. Weekly rhythm (jobs only)

If the visiting frequency is not suitable for the job, a different value can be entered here.

12. Report file

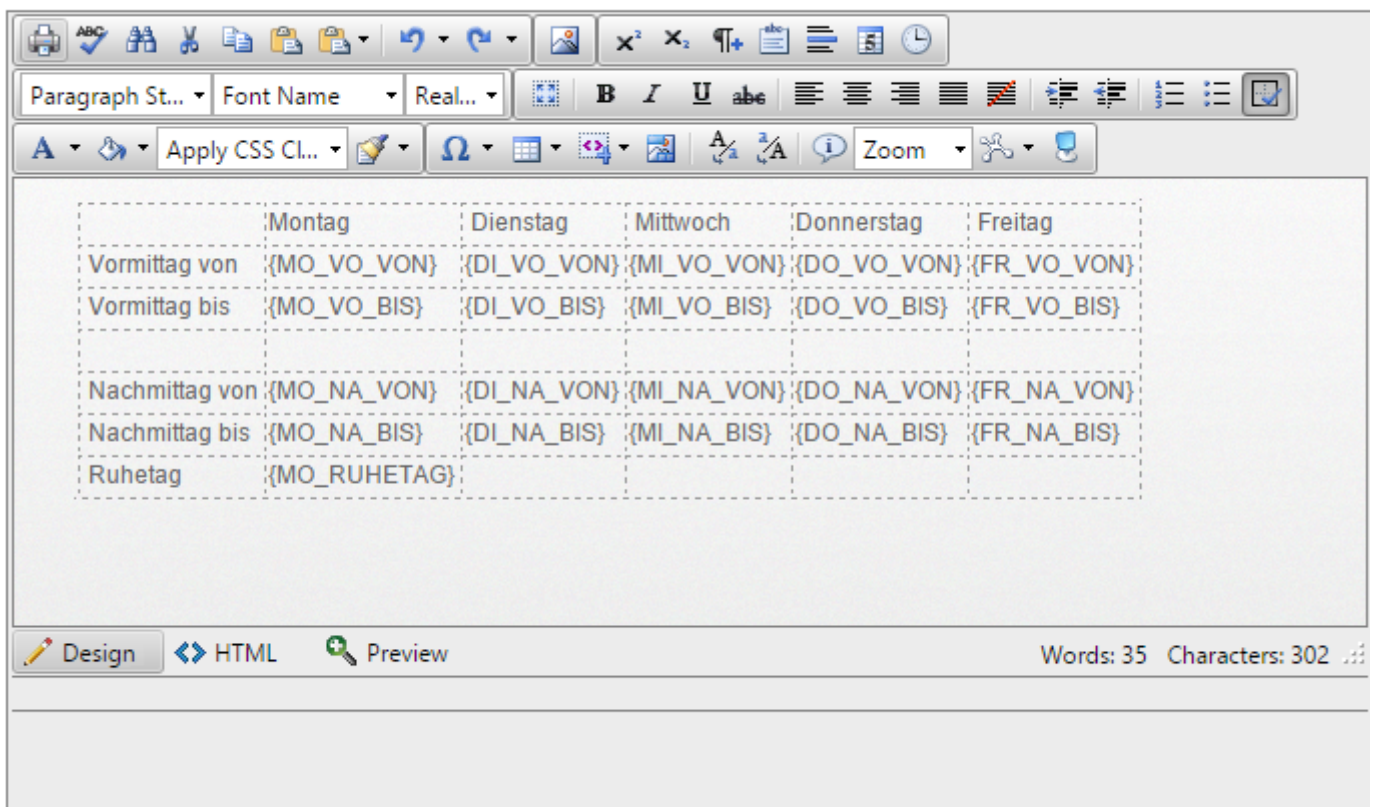
If you have licensed the Reporting module, you can upload a reporting file here.

Level 2 – Creating the Page Template

By default, the display for the Tasks and in the CRM type is in the order of the questions from top to bottom. Depending on the type of data to be documented, however, a different view is sensible, for example a tabular view if the field service is to document the opening hours for each day of week.

You can further personalise the design with the page template. To do this, click on the corresponding page and scroll to the template input:

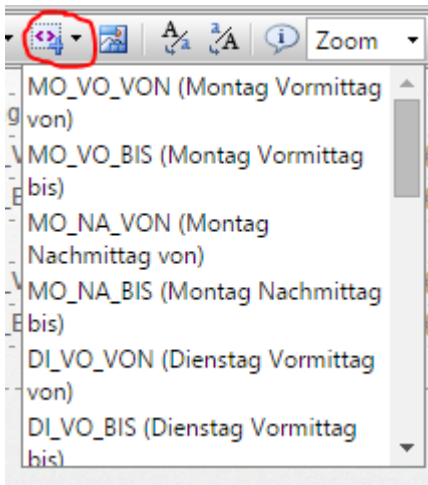
Template 



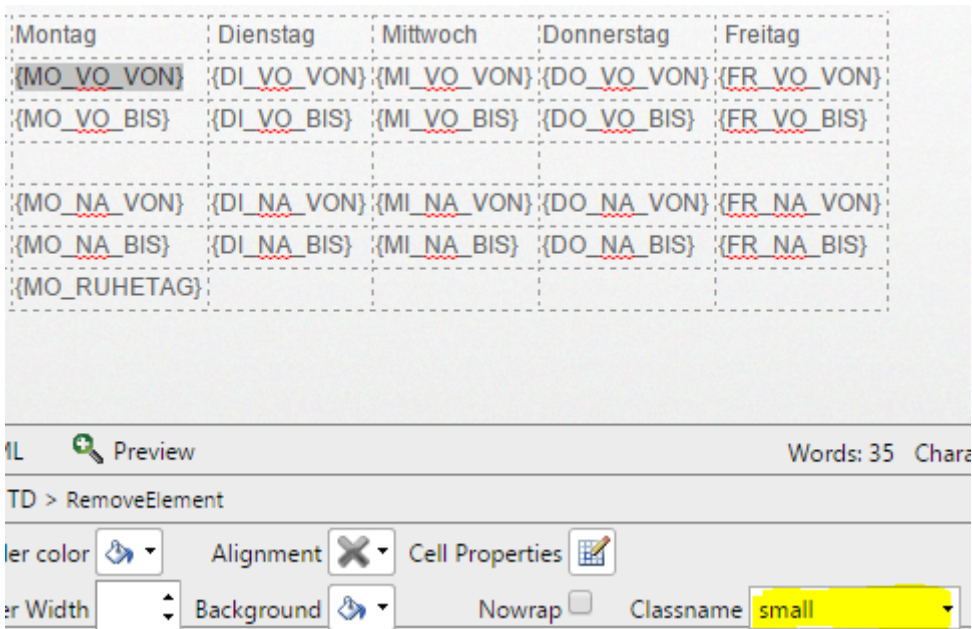
The screenshot shows a web-based template editor. At the top is a toolbar with various icons for text formatting, alignment, and insertion. Below the toolbar is a text input area containing a table. The table has 6 columns representing days of the week (Montag to Freitag) and 5 rows representing time periods (Vormittag von, Vormittag bis, Nachmittag von, Nachmittag bis, and Ruhetag). Each cell in the table contains a placeholder code in curly braces. At the bottom of the editor, there are tabs for 'Design', 'HTML', and 'Preview', and a status bar showing 'Words: 35' and 'Characters: 302'.

	Montag	Dienstag	Mittwoch	Donnerstag	Freitag
Vormittag von	{MO_VO_VON}	{DI_VO_VON}	{MI_VO_VON}	{DO_VO_VON}	{FR_VO_VON}
Vormittag bis	{MO_VO_BIS}	{DI_VO_BIS}	{MI_VO_BIS}	{DO_VO_BIS}	{FR_VO_BIS}
Nachmittag von	{MO_NA_VON}	{DI_NA_VON}	{MI_NA_VON}	{DO_NA_VON}	{FR_NA_VON}
Nachmittag bis	{MO_NA_BIS}	{DI_NA_BIS}	{MI_NA_BIS}	{DO_NA_BIS}	{FR_NA_BIS}
Ruhetag	{MO_RUHETAG}				

As you can see here, a table was created in the template. Horizontally, the days of week from Monday to Friday are displayed. Vertically, the opening hours for Morning and Afternoon, each from and until.



In the respective columns, the IDs of the respective questions are enclosed in curly brackets. You can either enter these manually or use the selection option provided by the template editor. Click on the black arrow in the icon circled on the right. Then the selection of all questions opens.



The input fields are all relatively wide by default. This can also be edited using the template editor. To do this, highlight a complete ID in the editor (including the curly brackets). At the bottom area, you have a field "Classname". If you choose e.g. "small" here, the input field will be displayed significantly narrower.

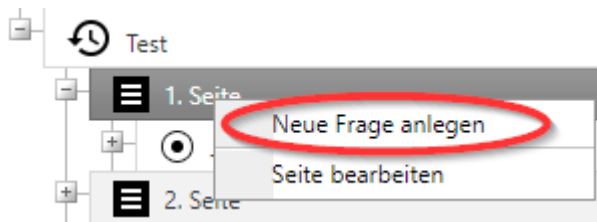
General Information 1: the page can only be formatted once the questions from the next step have been created.

General Information 2: if something is entered into the page template, all fields must be applied manually, otherwise they will not be displayed in the client.

Level 3 – Creating a Question Using the Free Text Example

At least one question must be created on each page; otherwise, the pages will not be displayed

Questions are created by right-clicking on the page:



Typ 

1

Titel 

2

Anz. Zeichen 

3

Regulären Ausdruck für die Prüfung 

4

5 ☐ Ist Pflichtfeld 

6 ☐ Freie Erfassung am Ende 

ID 

7

1. Type:

Question Type	Behaviour
Single Choice	Only one answer option can be selected at a time.
Multiple Choice	Multiple answer options can be selected
Free text	Free text without line breaks. The number of characters can be set arbitrarily
Confirmation	A field that can be ticked
Number	Whole number
Date	

Question Type	Behaviour
HTMLInfo	Required to start JAVA Script commands
Time	
Dropdown list	Several answer options are displayed, but only one can be selected
Decimal	Decimal number
Signature	Provides a field for a signature
Picture	Pictures can be taken with the Camera or loaded from the gallery
E-Mail	Checks whether the e-mail complies with valid rules, i.e. contains an @ and a domain ending
URL	Validity of the address is checked based on the domain ending
Telephone	Telephone numbers must contain a / (slash)
Text area	Free text where line breaks can be made or, for example, smileys can be inserted on the tablet
Text info	Used as pure display text
Promotion	Here you can execute an action via JavaScript programming
Hidden	This field can be used, for example, to compare previous values hiddenly. Requires Java programming

General Information: Single Choice, Multiple Choice, Dropdown list require answer options.

2. Assign the Title of the question

3. For Free text, you can influence the number of characters to be entered

4. For Free text, you have the option to insert a regex expression for validation, e.g. \d+ allows only numbers

5. Tick Mandatory if an answer is required for the question. Without an answer, the job cannot be left.

6. Here you can Allow additional texts

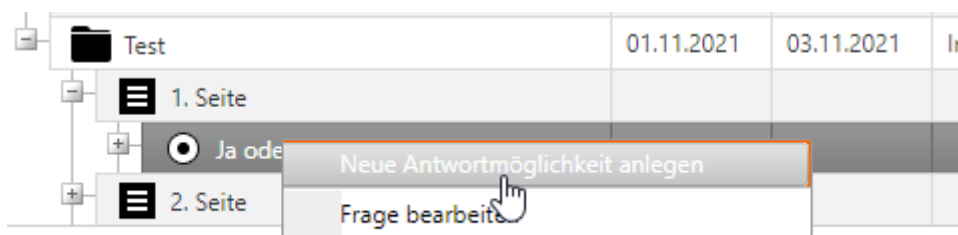
7. The ID must be assigned mandatorily so that the job can be evaluated, see also point 9 from chapter Level 1.

Level 4 - Create Reply Option

Special features for question types SingleChoice, DropDown or Multichoice

Now the reply options for the question must be created

Right-click on the previously created question, select new reply option:



Text: Mandatory field. Here you enter what the reply can be

Allow additional texts: here you can allow further information for the reply

ID: optional, but should be filled in so that an Evaluation can take place

Simple reply:

Text ?

ja

☐ Zusatztext erlauben ?

ID ?

ja

Reply with Addendum

Text ?

nein. Wenn nein, bitte
Zusatztext ausfüllen

☒ Zusatztext erlauben ?

Art des Zusatztextes ?

Freitext	▼
Freitext	
Zahl	
Datum	
Dezimal	



Level 5 - Subpage in Pages

It is possible to add further branching for SingleChoice / MultiChoice and Dropdown lists depending on the Replies.

Advanced example with nested subpages. We ask about 4 Colours and want to extend each Reply with justifications.

Step 1

After creating a new Page, we create the Question for it:



The screenshot shows a form for creating a question. It includes the following fields and options:

- Typ**: A dropdown menu with "Multiple Choice" selected.
- Titel**: A text input field containing "Welche Farbe?" with a yellow border.
- Ist Pflichtfeld**: A checkbox that is currently unchecked.
- ID**: A text input field containing "Farbe".

Step 2

Within the Question, we create the Reply options:



☐ Zusatztext erlauben 

ID 

rot

☐ Zusatztext erlauben 

ID 

gelb

☐ Zusatztext erlauben 

ID 

blau

Text 

andere

☐ Zusatztext erlauben 

ID 

andere

Step 3

We create further subpages for the individual Reply options.

Result when creating a subpage for each Colour:



Step 4

The Result in the client:

Seite 1

Welche Farbe?

☒ rot

Begründen Sie, warum Sie rot wählen

Begründung Rot

☒ gelb

Begründung Gelb

hell

hell

☒ fröhlich

☒ andere

Warum anderen Farbe

- ☐ Farbenblind
- ☒ Meine Farbe ist nicht dabei

Bitte geben Sie Ihre Farbe an

Welche Farbe fehlt?

☐ Kein Interesse

SPEICHERN

ABSCHLIEßEN

Jobs / Copy CRM

 **Assistent**
Bearbeiten der CRM Definitionen

Tätigen Sie im rechten Fenster Ihre Eingaben und bestätigen Sie diese im Assistenten!

 **Daten eingeben**

- Rechte
- Dokumente

Speichern / Weiter

Speichern / Vorgang beenden

Löschen

Vorgang abbrechen

1

Speichern / Kopie anlegen

2

In Zwischenablage ablegen

1. Save / Create a copy

You can copy a Job or a CRM with the button "Save / Create a copy" in the same Type. That means a query in the Customers Type will also be copied into the Customers Type. The new name will be "Copy of ...".

A new ID must be created for the copy so that it can be evaluated.

2. Save to clipboard

If you want to copy the Job from Customers to, for example, Contact in the CRM Type, use the button "Save to clipboard".

You can use the same in the Jobs Type if you want to transfer a Job, for example, from your test system to your live system.

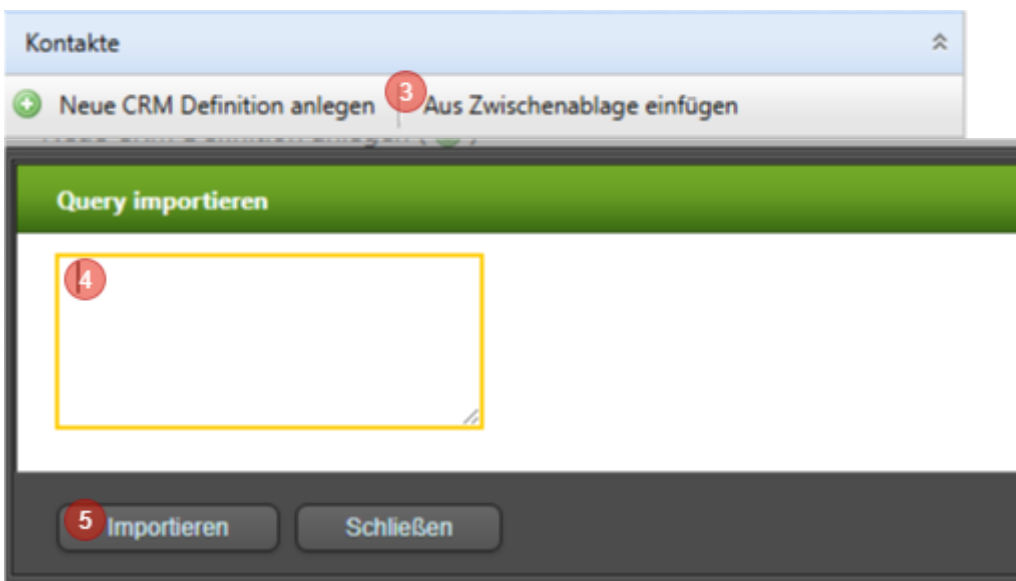
Open the source Job and select the button "Save to clipboard"



1. Click into the text field and copy the entire string from the text field using the right mouse button or Ctrl+C

2. Close the window and switch to your target Type.

3. There select the button "Paste from clipboard".



4. Click into the text field and paste the text from the clipboard with Ctrl+V or right mouse button.

5. The Job will be created with the Import button. No ID needs to be created because it is copied along. However, you have the option to change the ID, also the name of the Job or other amendments can be made as usual.

Customer Satisfaction

First, create a job or contact/customer CRM definition. Pay attention to the status and the assigned customer list.

Then switch to the Tasks - Customer Satisfaction type.

Aufgaben \ Kundenzufriedenheit

Exportieren einer Linkliste zur Kundenzufriedenheit

1 URL zur Erfolgsseite

2 URL zur Abbrechen-Seite

Datenschutztext vor Start der Umfrage

Normal Times New ... 16px

B *I* U **abc**

A **ApplyClass** **Custom Links** **Zoom**

3

Design

HTML

Preview

Words: 0 Characters: 0

1. Enter the link to the success page (Mandatory)
2. Enter the link to the cancellation page (Mandatory)
3. Enter the Privacy policy text (HTML formatting is possible)

Note that the Privacy policy must be confirmed beforehand, otherwise the survey cannot be answered.

Use the "Next" button to proceed to the definition.

 **Aufgaben \ Kundenzufriedenheit**
Exportieren einer Linkliste zur Kundenzufriedenheit

Quelle

1

Definition

2

Zugeordneter Mitarbeiter

3

4

1. Enter the source (Tasks or CRM Customer/Contact are possible sources)
2. The definition is the job you created for the survey
3. Assign an employee to the survey
4. Export the data to obtain an Excel list

In the list, you will get all customers to be considered for the job, with an encrypted link. Send this link to your customers (by e-mail or other means).

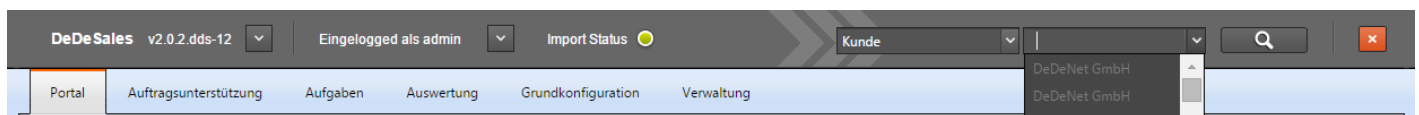
You can evaluate customer satisfaction in the client under the respective customers in the Tasks/CRM or in the backend under Evaluation - CRM.

Editing already completed tasks afterwards

Once a job is completed in the DeDeSales Client, there is no longer any possibility to edit it there. However, it occasionally happens that the user has made errors during input that prevent automatic evaluation of the job or distort the data. For this purpose, it is possible to edit jobs in the DeDeSales Web Backend, even if they are already completed.

Step 1

In the DeDeSales Web Backend, select the customer for whom you want to edit the job.



Step 2

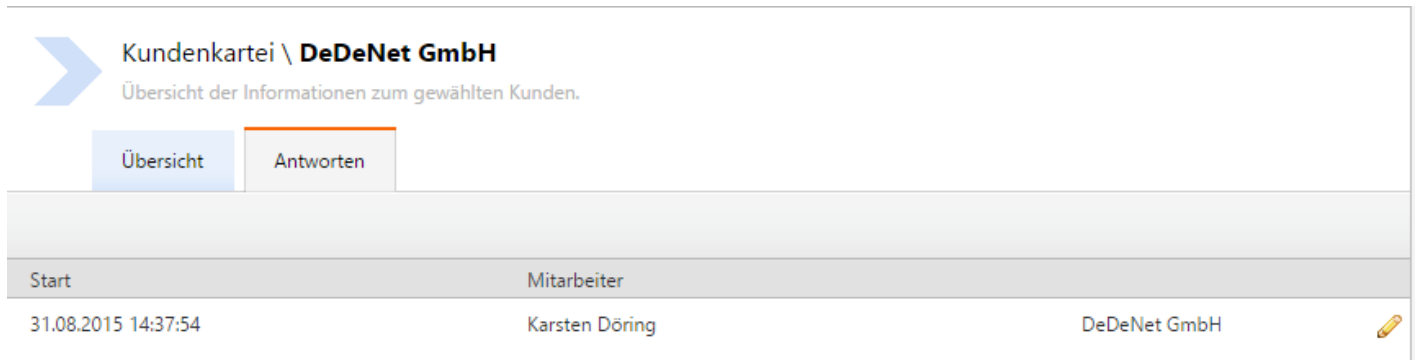
After the Customer masterdata screen has loaded, select the Type "Tasks" on the left and then select the corresponding job you want to edit.

The screenshot shows a list of tasks for the customer 'DeDeNet GmbH, Northeim, 10000'. The tasks are listed in a table with columns 'Name', 'Start', and 'Ende'. Each task has a status indicator (blue or red circle) to its left. The tasks are: 'Status Spülen', 'Kundenscreening', 'Wettbewerbsabfrage', 'Pizza.de Anbieter', 'Marktprotokoll', 'Backen mit Freude', 'ID Kugelschreiber vorstellen', and 'Inkasso steht bevor'.

DeDeNet GmbH, Northeim, 10000			
Besuche			
Aufgaben			
	Name	Start	Ende
●	Status Spülen		
●	Kundenscreening		
●	Wettbewerbsabfrage		
●	Pizza.de Anbieter		
●	Marktprotokoll	11.07.2013	30.09.2013
●	Backen mit Freude		
●	ID Kugelschreiber vorstellen	31.10.2014	07.11.2014
●	Inkasso steht bevor		

Step 3

Select the "Replies" tab and click on the pencil to edit the reply.



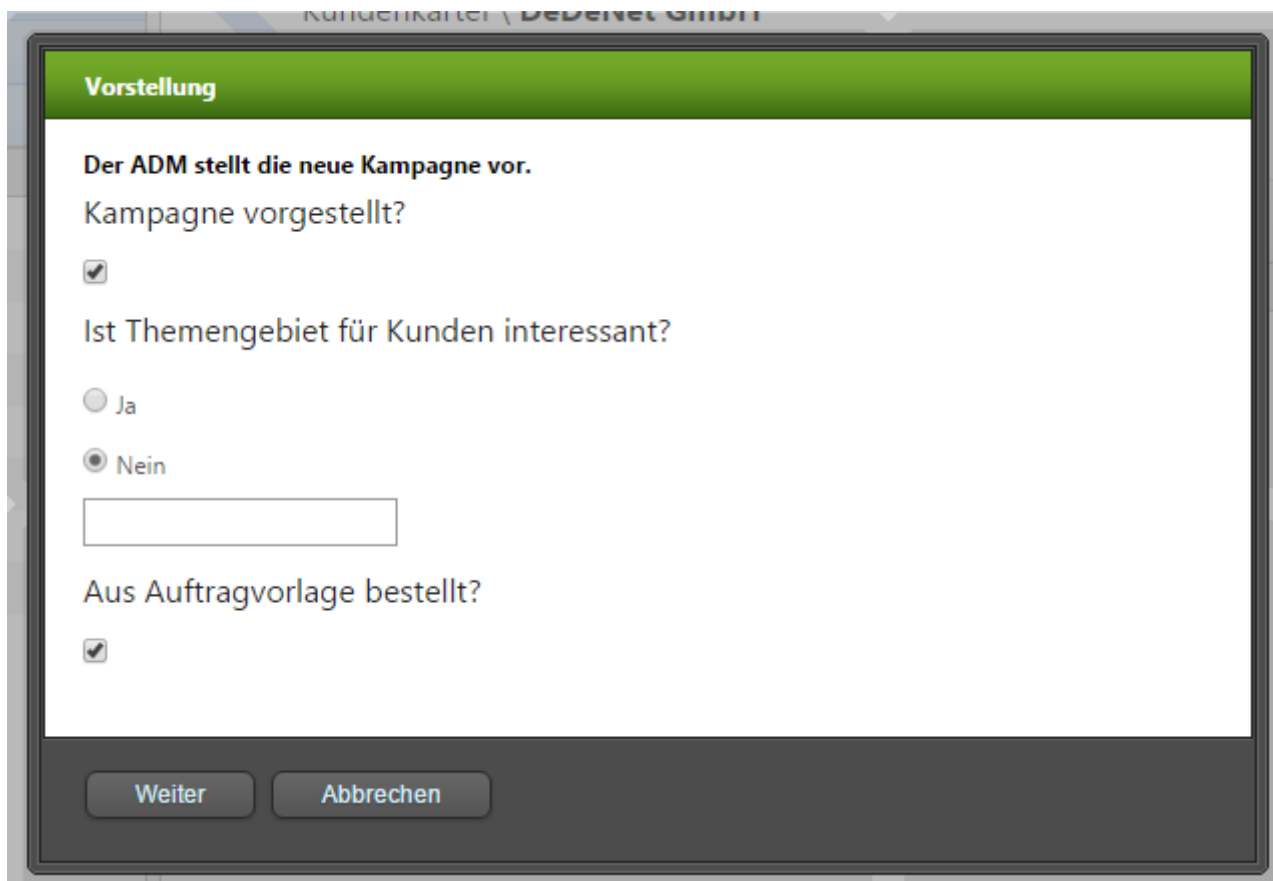
Kundenkartei \ **DeDeNet GmbH**
Übersicht der Informationen zum gewählten Kunden.

Übersicht Antworten

Start	Mitarbeiter	
31.08.2015 14:37:54	Karsten Döring	DeDeNet GmbH 

Step 4

Edit the reply.



Vorstellung

Der ADM stellt die neue Kampagne vor.
Kampagne vorgestellt?
☒

Ist Themengebiet für Kunden interessant?
☐ Ja
☒ Nein

Aus Auftragvorlage bestellt?
☒

Weiter Abbrechen

FAQ CRM and Tasks

Question: I do not see my page, my question or my reply in the Client:

Reply: No page, question or reply created

Question: I cannot evaluate my job via the Backend

Reply: No ID stored in the job and the questions

Question: Do I have to wait for the Total import every time to get a new or changed job on the Client?

Reply: No, a simple Data Transfer in the Client is sufficient.

Mass maintenance of Jobs / CRM via the Backend

To be able to edit/update multiple records simultaneously, mass maintenance is used.

Prerequisite:

All Questions and possible Replies (e.g. in Dropdown lists) must have an ID. If there is no ID, this will be shown as a General Information in the mass maintenance and mass maintenance cannot be performed. The reason is that the IDs name the database fields. Without a database field, the values cannot be saved.

Evaluation - CRM - Select Job or CRM

Click in the left Selection which query / CRM you want to Edit.

1. Then select the button: Export

Change data in Excel as desired.



Auswertung \ CRM \ Mehrseitige Aufgabe

Übersicht der Informationen zur gewählten Auswertung.

Übersicht

Massenpflege

Filter ein/ausblenden



Filter anwenden

Daten exportieren

1

Exportieren

Daten importieren

2

☐ Alle vorhandenen Daten vorher löschen

3

Datei Hinzufügen

4

Importieren

2. If necessary, Delete all previously created Replies with the tick, e.g. if you have deleted entire Lines in Excel. If you only want to update existing records, you do not need to set the tick.

3. After you have made your Amendments in Excel, select them for Import using the button "Add file".

4. Import the adjusted data with the button "Import".

General Information:

Columns can be added in Excel to perform Evaluations or to adjust values based on a new column using a formula. The added columns must be removed again before Import, otherwise no values will be imported.

The mass import will be aborted

- if there are columns without a header
- if there are duplicate columns
- if the column headers exist that are not present in the Job

Corresponding Error messages will be displayed in a pop-up window, e.g.

Fehler

Die Spalte Test ist unbekannt.

OK