

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.

Revision #7

Created 2026-08-31 10:03:50 UTC by n8n

Updated 2026-09-02 14:34:21 UTC by n8n