

Daily/Expense reports

In the Employee section, you have the selection between different evaluations of the daily reports.

Daily/Trip report

Here you can select a single day and, depending on the granted right (Administration / Roles - "Employee \ Is allowed to modify daily reports"), also edit or re-release it for the Sales rep. For the individual day, the visits are displayed accordingly in the "Visits" tab. New visits can be added at this point.

When you edit a daily or visit report, the data in the client is not changed. Via Export you can export the daily report as a PDF.

Monthly overview

At this point, you see in short form all daily reports from the 1st of the month until today. You have the option to switch to the day by clicking on the blue written date, or you can switch to the expenses via the blue written number.

Global view

Here you see all daily reports summarised by month. Clicking on a month takes you to the monthly report page or to the expenses.

Expenses

If the Expense entry has been enabled, you can view and export the expenses of an employee in the selected period here.

Attached documents (from version 19) can be exported as PDF or included as a download link in the email.