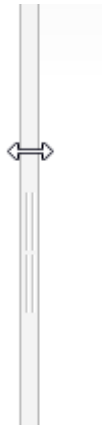
Basic Operation of the Backend

- Screen Splitting
- Tables
- Date Selection
- Restricting Data Access for Backend Users

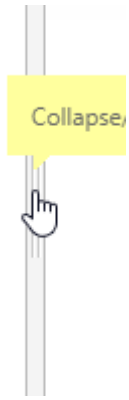
Screen Splitting

Most displays are shown split into two parts. You can adjust this layout according to your preferences.

Enlarge/reduce the window area on the left:



Move the mouse over the line and wait until the double arrow appears. Hold down the left mouse button and release it at the desired width.

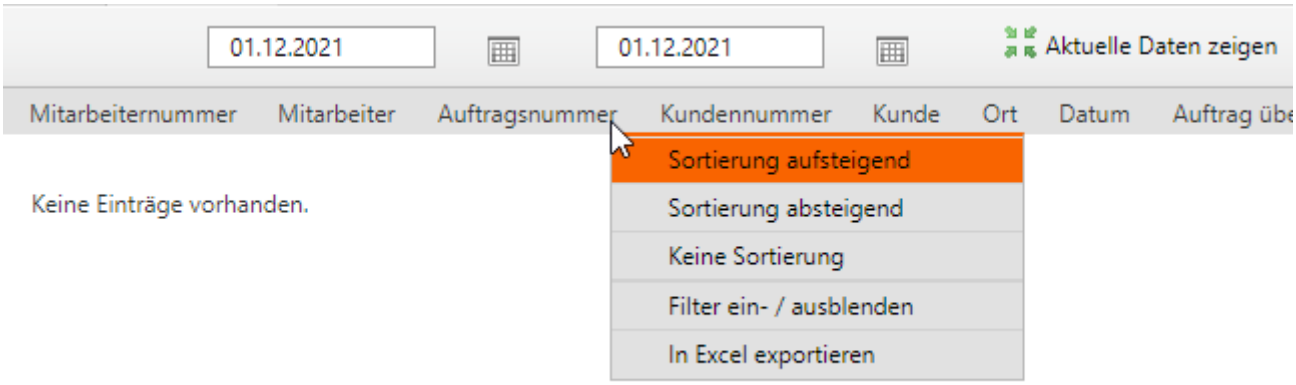


If you press the ridged button, the area will be displayed or completely Hidden. This option is available both horizontally and vertically.

Tables

In many areas, the data is presented in table form.

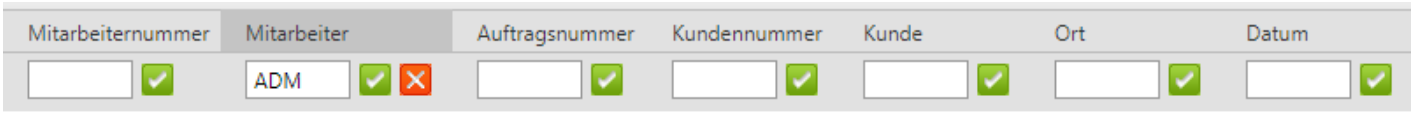
All views in table form can be sorted, filtered and Exported to Excel. To do this, right-click on the grey header bar.



The column under the mouse cursor is sorted.

"No sorting" resets the sorting.

Filters can be used, for example, when searching for a specific Number. An active filter is indicated by the input fields. Once something is entered, activate the filter by clicking the green tick. To Delete the filter again, click the red X. You can Disable the Display of the filter by right-clicking on the header row, but the values in the table remain filtered.

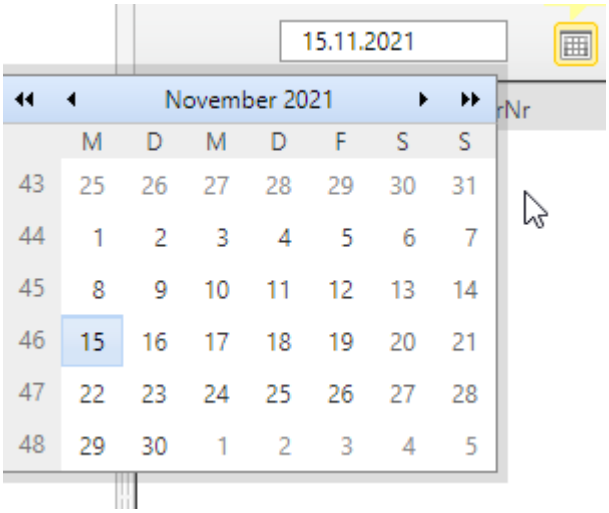


"Export to Excel" creates an XLSX File with the data from the table. WARNING: any filter set will not be considered. All data for the selected Period will be exported.

Date Selection

Usually, there is the option to select the date range. A check prevents, for example, the From-Date from being later than the until-Date. You can enter the date using the Keyboard or click on the calendar icon to select a date with the mouse.

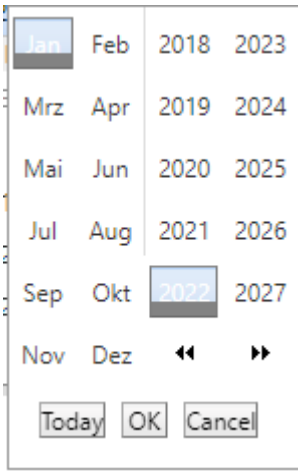
Date Selection



In many cases, you can set the Evaluation Period. For this, you can either enter the date in the field in the format dd.mm.yyyy or use the date picker. Here you click on the small calendar icon and have access to the current Month.

You simply click on a Day and it will be highlighted in Blue. To select the previous Month, choose the single arrow next to the Month name. The double arrow moves the selection 3 Months forward or back.

You can make larger time jumps by clicking on the Month name. Here you get the option to select Months and Years directly. The Selection must then be confirmed with OK.



Additionally, you have the "Today" button here, which quickly brings you back to the current Day.

Note that if a large Period is chosen, data collection may take longer than usual.

Restricting Data Access for Backend Users

In the Basic configuration > Employee section, it is possible to assign a web backend user to each employee. Through this assignment, as well as the assignment of the supervisor, it is possible to restrict a web backend user's access to employees and customers.

If a web backend user has no link to an entry from Basic configuration > Employee, they have full access to all customers and employees.

Let us assume the following company structure (KAM = Key Account Manager, SKAM = Senior Key Account Manager):

If you want to give the KAMs, SKAMs and the sales manager access to the DeDeSales web backend and restrict the access accordingly, you must do the following:

1. Assign all district managers the corresponding KAMs as supervisors.
2. Enter the corresponding user (from Administration > User) for each KAM under Basic configuration > Employee.
3. Assign all KAMs the corresponding SKAMs as supervisors.
4. Enter the corresponding user (from Administration > User) for each SKAM under Basic configuration > Employee.
5. Do not assign any users or Basic configuration > Employee to the sales manager, as this person should have unrestricted access as the highest hierarchy level.