

FAQ Trip

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Why is the daily or expense report not generated?

To create expense or daily reports for the employee via the backend, the checkbox Create agent reports must be selected.

Which source can I use for evaluations?

	Standard report "DAILY REPORT"	Expense report "Expense report"	JSon API	Individual report *all listed fields can be used as defined
Name	x	x		*
Agent number		x	x (Visits), x (DailyReports)	*
Date	x	x		*
Week no.	x			*
Start of day	x		x (DailyReports)	*
End of day	x		x (DailyReports)	*
Absence (h)	x			*
Overnight stay	x		x (DailyReports)	*
Car reg. number	x		x (DailyReports)	*
km start	x	x	x (DailyReports)	*
km end	x	x	x (DailyReports)	*
km business / non- business	x	x	x (DailyReports)	*
private car used			x (DailyReports)	*
Start location		x	x (DailyReports)	*
End location		x	x (DailyReports)	*

Breakfast		x	x (DailyReports)	*
Lunch		x	x (DailyReports)	*
Supper		x	x (DailyReports)	*
No travel day			x (DailyReports)	*
Day completed			x (DailyReports)	*
Document type from code list		x	x (DailyReports)	*
Document value		x	x (DailyReports)	*
DAILY REPORT note	x	x	x (DailyReports)	*
Per diem rate deduction		x		*
Total evaluation period		x		*
Expense document image		x		*
Type of activity (Visit/Express Order...)	x			*
Customer number	x		x (Visits)	*
Type of activity from visit activity code list	x		x (Visits)	*
Activity Note?			x (Visits)	*
Customer data	x			*
Type?	x		x (Visits)	*
Visit from	x		x (Visits)	*
Visit until	x		x (Visits)	*
manual time adjustment			x (Visits)	*
manually added			x (Visits)	*

Contact number			x (Visits)	*
carried out for			x (Visits)	*
Campaigns ID			x (Visits)	*
Visit description			x (Visits)	*
Day number			x (Visits), x (DailyReports)	*
Minutes	x			*
Prev.Visit	x			*
Target	x			*
Current	x			*
Total target	x			*
Total current	x			*
Visit no.			x (Visits)	*
multiple employees possible	x	x	x (Visits)	x
free date selection	x	x	x (Visits)	x
PDF	x	x		x
Excel				x
API data			x (Visits), x (DailyReports)	

Orders / eEturnOrders

Why can't I start a trip?

Attention: Please note the General Information that Daily reports, Expenses, Visits and Reports cannot be documented on a secondary device.

Please check whether you are using the main device and switch devices if necessary.

Why can't the Visit to the Customer be Started?

If the widget for the Visit is greyed out, then the Visit cannot be started.

This can be due to either the Day not being started, or a Visit with another Customer not being completed.

Cause: Visit Not Completed

Display the "Visit" widget on the Dashboard.



If the widget looks like shown above, there is no open Visit; the cause lies elsewhere.



If the widget is Blue and shows a Location, there is still an open Visit that must be completed before a new Visit can be started. By clicking the button, you jump to the Customer and can Continue or Complete the interrupted Visit.

Cause: Trip Not Started

To be able to conduct Visits, a Travel day must be started.

Why is an appointment created when I have visited a customer?

For a visit that is started without an appointment, an appointment can be created afterwards. The appointment and the visit are stored in the Activities for the customer.

This setting is available in the backend under Basic configuration - Settings - Update appointments after visit

Checkbox checked

When completing a visit, the "Calendar management" panel is displayed. Here you enter the status for the appointment and the result. Afterwards, you will find an appointment for the visit in the calendar and entries for the visit and the appointment in the Activities.

Checkbox not checked

No appointment is created afterwards for the visit when completing a visit