

Appointment Details

Title
Calendar management

Header

Demo11

2

K-NR.

PLZ

ADRESSE

10002

76275

Ettlingen, Am Erlengraben 8

- 1. Customer details
- 2. View mode
- Eye icon (opens the customer masterdata)

K-NR.

PLZ

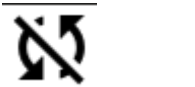
ADRESSE

1

- 1. Edit mode
- Pencil icon (change customer)
 - i. Appointment end is updated and is start + Visit duration (if Visit duration is not available, 30 minutes applies)

Icon bar

Position	Status	Google Material Name	Icon
1	Done	Beenhere	

2	Cancelled	Cancel	
3	Fixed appointment	Watch Later	
4	Hotel	Hotel	
5	Changed serial appointment	Sync Disabled Changed appointment belonging to a series.	
6	Serial appointment	Loop	
7	ABC status	Circle with corresponding backend configured border colour. The circle contains ABC. The icon is only visible if a colour code for the corresponding status is configured. If no colour is defined for the ABC status, the icon is not displayed. The colour code is configured via Code tables: Appointment / Tour ABC status dependent colours.	
8	Visit status	Circle with corresponding border colour. The circle contains ST. The grey colour from 3.0 is not used, the icon remains as shown here. If no colour is defined for the visit status, the icon is not displayed.	

The icon bar is hidden if no icon is present.

Data

1. Panels

a. Time slot

- Visible only in view mode.
- Always 4 hours visible, starting 60 minutes before the appointment start.
- If the appointment lasts less than 3 hours, the appointment is vertically centred in the view.
- Scrolling in the panel is disabled on all systems.

b. Details

- Start - End
- DateTimeSpan Picker: if the start is changed, the end is automatically changed as well.
- Full day
- Contact
- Type of activity
 - Hidden if no code table entries are available.
 - The first is selected if available.
 - Code table: Appointment / Tour types of activity
 - Basic configuration - Settings: Type of appointment activity Visit and Type of appointment activity preselected
- Status
 - Hidden if no code table entries are available.
 - The first is selected if available.
 - Code table: Appointment status
 - Basic configuration - Settings:
 - Appointment status "cancelled" - code table entry selection
 - Appointment status "done" - code table entry selection
 - Appointment status Follow-up visit completed - code table entry selection
 - Appointment status Follow-up visit necessary - code table entry selection
- Result
 - Hidden if no code table entries are available.
 - The first is selected if available.
 - Code table: Appointment results
- Campaign
 - Hidden if no campaigns are valid or created
 - No preselection, can also remain empty
 - see also [Campaign](#)

- Fixed appointment
 - Checkbox, only visible if Tour optimisation is licensed
- Comment
 - Multiline input

c. Visit announcement

- Role DAILY REPORT / calendar management Visit announcement
 - Hidden if not possible due to missing recipient information
- Send Notification of Visit
 - Checkbox (corresponds to dropdown selection "None")
- Announce appointment
 - Mornings
 - In the Afternoons
 - Entire day
 - Time as specified in the appointment
- Subject
 - Hidden if no code table entries are available.
 - No preselection, can also remain empty
 - Code table: Appointment text blocks
- Short text
 - Multiline input. Automatically filled if a standard text is behind the subject.

d. Visit objectives

- Lists all order template and task titles that are active for the customer. Here you mark which points you want to focus on in the appointment.

e. Serial appointment

- only visible when editing or creating a series
 - Interval (weeks)
 - Series end

f. Miscellaneous

- Created by
- Created for
- Recorded
- Changed

g. Address

- Filled by the selected customer
 - Street

- Postal code
- City
- Country

2. Buttons

a. View mode

The screenshot shows a mobile application interface for 'TERMINPLANUNG' (Appointment Planning). At the top, there is a blue header bar with a back arrow, the title 'TERMINPLANUNG', a plus sign, and a three-dot menu icon. Below the header, the company name 'DeDeNet GmbH' is displayed, followed by a table of contact information:

K-NR.	PLZ	ADRESSE
10000	37154	Northeim, Scharnhorstplatz 5

Below the contact information, there is a section titled 'Zeitfenster' (Time Window) with a dropdown arrow. It shows a timeline from 11:00 to 14:00. A green bar represents an appointment for 'DEDENET GMBH Northeim' from 12:00 to 13:00. Below the timeline, there is a 'Details' section with a dropdown arrow and a pink 'ABC' icon. The details section shows the start and end times: '25.06.2025 12:00' and '25.06.2025 13:05'. At the bottom, there are two buttons: a red 'LÖSCHEN' (Delete) button and a blue 'BEARBEITEN' (Edit) button.

- Delete (red)
 - not shown if appointment is part of a series
 - Confirmation is shown whether the appointment should really be deleted.
- Series
 - only shown if part of a series
 - switches to Edit series

b. Edit mode:

TERMINPLANUNG

DeDeNet GmbH

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10000

37154

Northeim, Scharnhorstplatz 5

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Details

ABC

Beginn / Ende

25.06.2025 12:00

25.06.2025 13:05

☐

Ganztägig

Kontakt

Aktivitätsart

Status

Ergebnis

LÖSCHEN

SPEICHERN

- Delete (red)
 - not shown if appointment is part of a series
 - Confirmation is shown whether the appointment should really be deleted.
- Save (blue)

Colour codes visit status

Status	Colour
Standard or Visit (planned) as intended	none
Appointment not visited in the week	Red
Appointment attended on another day in the week	Yellow
Visit was not planned in the current week	Green

Colour codes ABC

The colour can be configured directly in the backend.

Code table: Appointment / Tour ABC status dependent colours

Colour codes activity

The colour can be configured directly in the backend.

Code table: Appointment / Tour types of activity dependent colours

Colour codes due date

Status	Colour
No visiting frequency in customer masterdata	Black
No last visit available	Purple
Last visit + Visiting frequency > current calendar week	Green
Last visit + Visiting frequency == current calendar week	Yellow
Last visit + Visiting frequency < current calendar week	Orange
Last visit + (Visiting frequency * 2) <= current calendar week	Red

FAQ

Why don't I see the time when I want to change an appointment?

If the device is too small to display date selection and time simultaneously, the calendar selection is shown first and after tapping the date, the time selection appears.

Release

