Tour suggestion

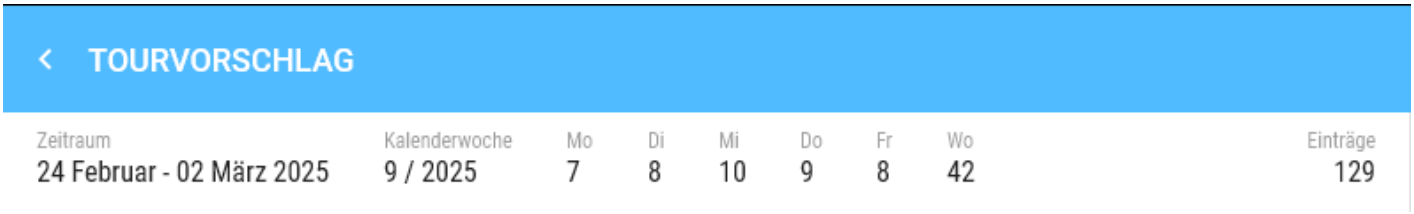
Accessible via

Calendar management > Triple-Point menu, when you are in the day, week, or work week view.

Prerequisites

1. The customer must not be a distributor.
2. The customer must not be deleted.
3. The field Tour is required (controls the day of the week)
4. If there is a start week, the start week is used for the calculation, otherwise the last completed visit.
5. If there is a start year, the start week is calculated based on the start year, otherwise the current year is used.
6. If there is no visiting frequency but a tour, the day of the week is selected, but the checkbox for the visit is not set.

Header



2. Filter

Standard filter with the following addition

- Order templates
  - Checkbox list of all valid order templates.
- Tasks
  - Checkbox list of all valid tasks.

Grid

Click	Swipe	Views
Detail page	1. Calls up the customer	1. Table

Column definition

Name	Visible	Sort.	Full text	Additional info
Checkbox	ForceVisible			Include select/deselect all Automatic preselection only occurs for assigned to an agent customers Disabled if the appointment was not created via another planning (e.g. manually).
Day of week	ForceVisible			Dropdown of weekdays (Monday-Friday)
Customer columns				
Turnover <current year>	Hidden			Format: yyyy (only for assigned to an agent customers)
Turnover <previous year>	Hidden			Format: yyyy (only for assigned to an agent customers)
Performance (year)	Hidden			=Turnover<current year> / Turnover<previous year>
Turnover <last month>	Hidden			Format: mmm yy (only for assigned to an agent customers)
Turnover <last previous year month>	Hidden			Format: mmm yy (only for assigned to an agent customers)
Performance (moth)	Hidden			=Turnover<last month> / Turnover<last previous year month>

Name	Visible	Sort.	Full text	Additional info
Turnover / visit <previous year>	Hidden			Format: yyyy (only for assigned to an agent customers)
Days since last visit	Hidden			Number of days
Next visit	Hidden			Format: dd.mm.yyyy
Number of visits	Hidden			
Turnover / visit (actual)	Hidden			
Turnover / visit (target)	Hidden			

Right area

1. Header (like Calendar management)
2. Details

Special feature Android:

On Android, the eye in the Details column must be clicked to see the right area.

Name	Additional info
Visit (planned)	Checkbox
Day of week	Dropdown of weekdays (Monday-Friday)
Visiting frequency | Visit duration | Tour	
Visit (last) | Next | Number	Format: dd.mm.yyyy
Turnover <current year> | <previous year> | %	Format: yyyy | Performance=Turnover<current year> / Turnover<previous year> (only for assigned to an agent customers)
Turnover <last previous year month> | <last month> | %	Format: mmm yy Performance=Turnover<last month> / Turnover<last previous year month> (only for assigned to an agent customers)

Name	Additional info
Turnover / visit | Target | <previous year>	Format: yyyy (only for assigned to an agent customers)
ABC status	
Parent customer number	

1. Tasks
   a. Columns
      i. Name
      ii. Start (width: 10 characters)
      iii. End (width: 10 characters)
2. Order templates
   a. Columns
      i. Name
      ii. Start (width: 10 characters)
      iii. End (width: 10 characters)

Miscellaneous

1. Appointments created via this planning receive the appointment status "AUTO"
2. If at least one appointment with status "AUTO" exists in the selected week, no automatic planning will take place.
3. Employee changes are not possible in this planning.

Leaving the page

If there were changes and you want to leave the page, a message appears:
"You have changed data, do you want to cancel your changes?"

Action buttons: ok, Cancel Changes

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