ORDER

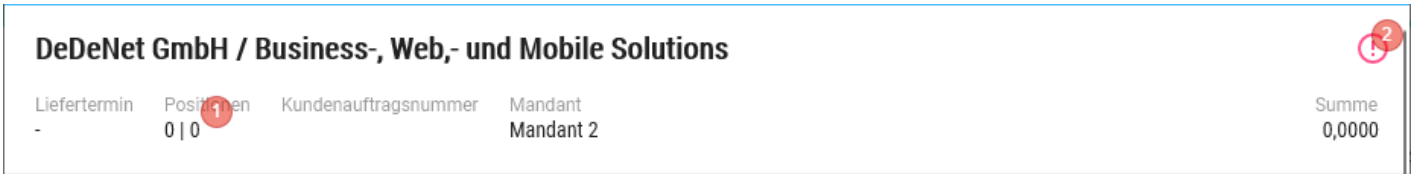
- ORDER / header
- Order mask
- Item entry - Grid
- Item entry - Entry area
- Tab bar of the entry mask
- Matrix Entry
- Product documents
- Processing Mass Barcodes
- Cart entry
- Product recommendations

ORDER / header

Title	Widget	Widget description
Create order	+ ORDER	Click: Opens the new order header Available a. Customer details

General

Header



1. Displays the number of items and the total quantity (items | total quantity)
2. The exclamation mark is shown in red if there is a special feature with the order, e.g. Delivery block.
    1. Contains additional order-related information
    2. Click: Opens the information

Form

Order

Field	Permission	Reference
Type of order	ORDER / header / Types of orders	Code table: DeDeSales Auftragsart
Order type	ORDER / header / Order type	Code table: Order type
Alternative invoice recipient	ORDER / header / Alternative invoice recipient	
Date of delivery	ORDER / header / Date of delivery	
Fixed value date	ORDER / header / Fixed value date	
Order confirmation	ORDER / header / Order confirmation	
Incoterms	ORDER / header / Incoterms	Code table: Incoterms

Field	Permission	Reference
Order date	ORDER / header / Date of order can be freely changed by the employee	
Discount in %	ORDER / header / Order discount	
Terms of payment	ORDER / header / Terms of payment	Code table: Terms of payment
Method of payment	ORDER / header / Method of payment	Code table: Method of payment
Freight costs	ORDER / header / Show freight cost selection	
Campaign	ORDER / header / Campaigns	Campaigns

Order texts

Field	Permission	Reference
External order text	ORDER / header / External order text	
Internal order text	ORDER / header / Internal order text	
Delivery note	ORDER / header / Delivery note	
Picking text	ORDER / header / Picking text	

Delivery

Field	Permission	Reference
Delivery note without price	ORDER / header / Delivery note without price	
Delivery with next order	ORDER / header / Delivery with next order	
Maintain backlogs	ORDER / header / Maintain backlogs	
Terms of delivery	ORDER / header / Terms of delivery	
Delivery address	ORDER / header / Delivery address; select from database & entry of a new address	
Delivery point	ORDER / header / Enter delivery point	
Type of delivery	ORDER / header / Type of delivery	

Customer order information

Field	Permission	Reference
Customer order number	ORDER / header / Customer order number	
Contact	ORDER / header / Select contact	Contacts

Field	Permission	Reference
List of contents	ORDER / header / List of contents	

Summary

Field	Permission	Reference
Name	ORDER / header / Signature	
Signature	ORDER / header / Signature	

Validation

A validation and recalculation of the order items takes place as soon as one of the following fields in the header is changed:

1. Type of order
2. Date of delivery
3. Order date
4. Discount in %

Time	Type	Validation	Display
Creation	Blocked	Create order not possible! The customer has an order block. <code Auftragssperre>	Popup
Completion	Warning	1. Minimum order value not reached. 2. Credit limit exceeded. 3. Fixed value date before date of delivery. 4. Minimum order value not reached.	Message

Time	Type	Validation	Display
Completion	Blocked	1. Date of delivery not possible. 2. No type of order specified. 3. Order date is in the future. 4. Delivery address incorrect. 5. Delivery address no longer exists. 6. Postal code incorrect. 7. Minimum order value not reached. 8. No customer order number specified. 9. No delivery point specified. 10. No date of delivery specified. 11. Date of delivery is before order date. 12. Distributor not found. 13. Distributor customer number not present. 14. Products not in closed listing at distributor. 15. No order completion for prospects.	Message
Completion	Blocked	1. Please enter a batch for the following products	Popup
Completion with order split	Query	You have items from multiple clients in this order. To proceed to the next step, the orders must first be split. Would you like to perform the order split now?	Popup

Action buttons

Name	Function	Visibility
Save	Saves the order. The order can be further edited later but cannot yet be sent.	Directly when creating the order or when clicking the pencil in the order mask.
Complete	Saves the order and sets the status to Completed. The order can be selected and sent in Data Transfer.	When clicking "Complete" in the order mask.
Send	The order is completed and the dispatch of this order is executed immediately.	When clicking "Complete" in the order mask.
Transfer to another device	Transfers the order to another device of the employee.	If the order has been saved in the order mask and the employee has multiple devices assigned.

Release

From version 15

1. Validation and recalculation of order items when certain fields are changed.

Order mask

Title
Order If a type of order is selected: Order / "Type of order"

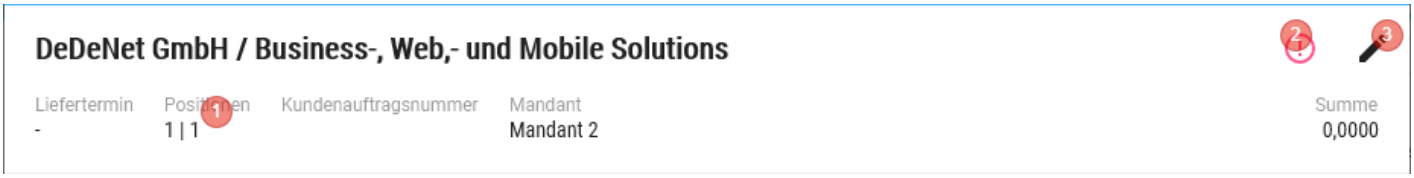
General

Kebab menu (⋮)

Type	Menu item	Explanation
	Order header	
	Send order suggestion	
	Live price enquiry	• The Live price enquiry sends the order to the ERP system for price calculation. The returned prices are updated in the order. • The function requires the ERP system to provide a corresponding interface (e.g. SAP, Dynamics NAV)
	Listing	
	Complete order	
	Interrupt order	
	Customer notes	Coming via the summary from the dashboard, the dashboard of the customer is displayed as a jump-off point.

Type	Menu item	Explanation
	Transfer to another device	Only visible if multiple devices are assigned to the employee.

Header



1. Shows the number of items and the total quantity (Items | Total quantity)
2. The exclamation mark is displayed in red if there is a special feature with the order, e.g. Delivery block.
    1. Contains additional order-related information
    2. Click: Opens the information
3. Jumps to the Order header

Widgets

1. AVO
2. product hierarchy
3. Completion
4. Order suggestion (Also active for orders that are no longer editable.)
5. Consignment stock
6. Live price enquiry
7. Photos
8. Attachments
9. Listing
10. MRP list (Also active for orders that are no longer editable.)
11. Favourites
12. Import
13. Cart entry

Items

Plus (+)

Calls up the Item entry to add new products to the cart.

Grid

Click	Swipe	Views
Edits the item	1. Product details 2. Product documents 3. Delete	1. Table

Column definition

Name	Visible	Sort	Full text	Explanation
Colour code	Forced			Red: If the price was manually changed.
Image	Hidden			
Item	Hidden	Ascending		
Product	Landscape		Yes	
Name	Always		Yes	
Quantity	Always			
Nat.disc.	Hidden			
VeCode	Landscape			
Price	Always			
Sum	Always			
Reason for free offer	Hidden			
Batch	Hidden			
From vehicle	Hidden			
Discount	Hidden			
Internal text	Hidden			
Customer text	Hidden			
Picking text	Hidden			

Name	Visible	Sort	Full text	Explanation
Date of delivery	Hidden			
Colour	Hidden			
Size	Hidden			
Status	Hidden			
ERP status	Hidden			
Bill of materials	Hidden			
Item.attribute1-16	Hidden			
EAN	Hidden			
Rank	Hidden			Sorting indicator from product master data
Hierarchy	Hidden			Name and number
Module 1	Hidden			
Module 2	Hidden			
Module 3	Hidden			
Module 4	Hidden			
Sales price	Hidden			

FAQ

Release

Item entry - Grid

Title
The title shows which products are displayed, e.g. the name of the order template. If there is no concrete list, the title "Product entry" is used.

General

Kebab menu (⋮)

Type	**Product details**	**Only visible when a product is active.**
	Product documents	Only visible when a product is active.
	Create as new item	Only active when the product is already in the cart. Direct selection inactive: Clicking directly adds the current product to the cart as a new item.
	Product recommendations	AI module required
	Delete	Only visible when the product is already in the cart.

	Cart	
	Direct selection	**Inactive:** When selecting a product in the grid, only the header is updated. **Active:** When selecting a product in the grid, the Item entry area is switched to.

Type	Product details	Only visible when a product is active.
	Quick entry	Only available under UWP. **Inactive:** Pressing ENTER in the "Quantity" field adds the current product to the cart and selects the next product in the grid. **Active:** Pressing ENTER in the "Quantity" field adds the current product to the cart and exits the entry mask. The cursor moves to the search field.
	Attachments	Only visible when accessed via an order template.

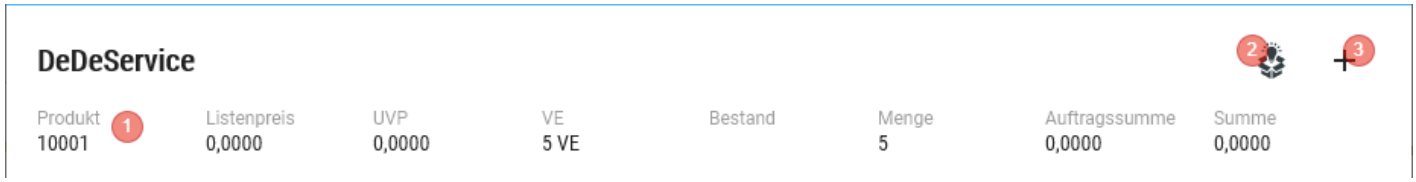
Functions in the title bar

Icon	Explanation
	Enables processing of mass barcodes.

Header

The headers differ depending on whether the product is already in the cart or not.

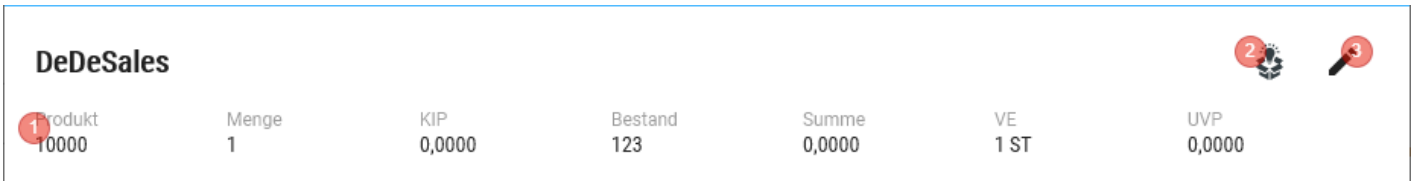
Product is not yet in the cart



1. The fields to be displayed in the additional item entry line can be configured in the backend under Basic configuration > Settings > "Additional item entry line - new item".
    1. Product*
    2. List Price*
    3. RRP*
    4. Packaging unit (e.g. 1 pc.)*
    5. Stock level*
    6. Item attributes 1-16
2. If activated, the live stock level can be queried here.
3. Switches to the Item entry mask to add the product to the cart. The icon is only visible if "Direct selection" is **inactive**.

* these fields correspond to the default setting.

Product is already in the cart



1. The fields to be displayed in the additional item entry line can be configured in the backend under Basic configuration > Settings > "Additional item entry line - item in cart".
   1. Product*
   2. Quantity (also shows Rebate in kind, e.g. 4+1)*
   3. KIP*
   4. Discount*
   5. Total*
   6. Batch
   7. Item attributes 1-16
2. If activated, the live stock level can be queried here.
3. Switches to the Item entry mask to edit the selected item. The icon is only visible if "Direct selection" is **inactive**.

* these fields correspond to the default setting.

Display format of the stock field

Stock level	Next receipt on	Stock after receipt	Start of Delivery	Available for Delivery from	Title	Content
Any	Any	Any	Available **	Available	Start of Delivery	DD.MM.YYYY
Any	Any	Any	Not available	Available **	Available for Delivery from	DD.MM.YYYY
=0	Available	Not available	Not available	Not available	Available for Delivery from	DD.MM.YYYY
=0	Available	Available	Not available	Not available	Available for Delivery from	DD.MM.YYYY > Stock after receipt
!=0	Available	Not available	Not available	Not available	Stock level	Stock level + DD.MM.YYYY
!=0	Available	Available	Not available	Not available	Stock level	Stock level | DD.MM.YYYY > Stock after receipt
Any	Not available	Available	Not available	Not available	Stock level	Stock level > Stock after receipt
Any	Not available	Not available	Not available	Not available	Stock level	Stock level

Not available corresponds in the data to: not delivered, delivered empty or the value 0.
Available corresponds in the data to: value not equal to 0.
** The "Start of Delivery" or "Available for Delivery from" date must be in the future to be considered available.

Grid

Click	Swipe	Views
Direct selection **active** 1. The product is activated. 2. Item entry and Header are displayed. Direct selection **inactive** 1. The Header is displayed / updated. 2. The Item entry is hidden.	1. DOCUMENTS (shows the documents in which the product appears for the selected customer) 2. DETAILS 3. DELETE (only available if the product is already in the cart)	1. Table 2. Images

Search bar

Symbol	Explanation
	The full text search is used.
 	1. First it checks if there is a product with the input. If not, it checks if the input starts with 0, trims all leading zeros and searches again for a product. 2. If still no result, it searches in Ean, EanVpe or Single EAN. 3. If nothing found, it searches in DAI for an item. 4. If nothing found, it checks against the "Rules for item suggestions" from the backend -> Settings. From version 20: By default, the rule states that all products starting with the entered number are now found. 123: iOS/Android opens the numeric keyboard for input. ABC: Opens the standard alphanumeric keyboard for input.

Column definition

Name	Visible	Sort	Full Text	Explanation
Colour code	Forced			
Image	Landscape			
Name	Always			

Name	Visible	Sort	Full Text	Explanation
Product	Landscape			
Quantity	Always			
Nat.disc.	Hidden			
Module 1	Hidden			
Module 2	Hidden			
Module 3	Hidden			
Module 4	Hidden			
Additional column 1	Always			Only available when accessed via an order template.
Additional column 2	Always			Only available when accessed via an order template.
Additional column 3	Always			Only available when accessed via an order template.
Product columns	Hidden			

Scrolling

1. Scrolling down (rows move down) displays the header when a product is activated.
2. Scrolling up (rows move up) hides the header.

Settings

1. If a column configuration is made after accessing this mask via an order template, the setting applies to the selected order template.

Scan function

A successful scan of a product directly opens the Item entry area

- for creating a new entry if the product is not yet in the cart.
- for editing if the product is already in the cart.

FAQ

Release

Version 18

1. ** Date must be in the future.

Item entry - Entry area

Title
Product entry

General

Kebab menu (⋮)

The entry area has the same Kebap menu as Item entry - Grid.

Header

In portrait view, the Header starts with the definition from the grid area.

Function	Explanation
	Jumps back one item in the grid area.
	Transfers the product to the cart. The entry area is exited/closed.
	Transfers the product to the cart and jumps forward one item in the grid area.
	Jumps forward one item in the grid area.
	You have selected a matrix item. Clicking the button opens the Matrix entry .

Following the functions is the Tab bar.

Validation

Time	Type	Validation	Display
Item call	Warning	1. Comment present 2. Status notice 3. Current not in open listing 4. Limit Price undershot 5. List Price exceeded 6. Max Order Quantity exceeded 7. Quantity of Goods increase optional and quantity check fails. 8. Max item value exceeded 9. Start of Delivery after Date of delivery 10. Date of delivery not possible 11. Max Quantity exceeded	Message
Item call	Warning	Current is in Back Order. An additional info button opens the information about the Back Order.	Message

Time	Type	Validation	Display
Item call	Blocked	1. Product Locked 2. Current not in closed listing 3. Product not intended for Client. 4. No charge without Reason for free offer. 5. Quantity of Goods increase mandatory and quantity check fails. 6. Manual price without Note 7. Natural quantity without Reason for free offer. 8. Batch mandatory for Quantity of Goods. 9. Quantity invalid.	

Scan function

- Scanning a product already in the entry mask increases the quantity in quantity of goods steps.
- Scanning another product
  - takes over the current product (like the "Save" function)
  - checks if the scanned product exists
    - Yes: Takes over the product as a new line item in the entry mask.
      - If a batch is required, the batch selection now appears, unless the batch is already included in the barcode.
    - No: Switches to the grid area and displays the standard message for not found.

Tab bar of the entry mask

The tab bar contains further information about the currently selected product or offers you the possibility to make additional entries. Depending on the activated rights, the tabs may not be visible or contain less information.

TAB: POS

The display of the individual fields depends on the activated rights in the employee's role.

Field	Right	Note
Quantity	This field is always present.	
Rebate in kind	ORDER / item / Rebate in kind	Only available in smartphone portrait view, as it is normally located in the entry mask.
		If the Rebate in kind field is not visible, buttons to decrease/increase the quantity in order unit steps are displayed.
Order units		This is not an input field.
Price	This field is always present.	If the price is manually changed, it is displayed in red.
Discount in %	ORDER / item / Enter discount	
Total		This is not an input field. The total changes automatically with the input.
From vehicle	ORDER / item / Goods already delivered	
Internal text	ORDER / item / Internal note	
Customer text	ORDER / item / External note	
Note 3	ORDER / item / Note 3	
Note 4	ORDER / item / Note 4	

Field	Right	Note
Retail price	ORDER / item / Retail price	
Reason for free offer	various	
Date of delivery	ORDER / item / Delivery date by item	
Long text (quotation only)	ORDER / item / Long texts editable in quotations	

Batch items

If a batch item is called up and batch recording is intended, the batch must first be selected / entered there. The following is displayed for this purpose:

1. Note: "Batch required"
2. Dropdown: "Select opportunity"
3. Input field "Enter opportunity"
4. Action button "Apply"

As long as the batch is not selected, the functions "Save" and "Right arrow (green)" are inactive.

TAB: DETAILS

Field	Note
Product image	Click opens "Products > Images"
Customer product no.	If it is a transfer order, the customer product no. is first determined based on the debtor. If no entry is found, the check is performed with the distributor.
EAN CODE	
Colour	
Size	
Commission	
Limit Price	
RRP	

TAB: MODULE

Modules are configured individually in the backend. Up to 5 modules can be displayed.

This tab is only displayed if modules are configured. See also Modules in the backend

TAB: HISTORY

Shows the item lines of the invoice documents for the selected customer and the selected product. The number of visible lines can be set in the backend via Basic configuration - Settings "Item history". The tab is only displayed if the corresponding right is set in the role, area "ORDER / items" in the backend.

Name	Visible	Sort	Full text	Explanation
Date	Always	Descending		
Receipt Number	Landscape		Yes	
Quantity	Always			
Price	Always			

Swipe: Show receipt

TAB: GRADUATED PRICES

Shows the available graduated prices of the offline pricing for the selected customer and the selected product. The tab is only displayed if the corresponding right is set in the backend.

Name	Visible	Sort	Full text	Explanation
Graduated price	Always			Standard Price, 1st graduated price, 2nd graduated price, etc.
Quantity	Always	Ascending		
Price	Always			
Valid from	Hidden			
Valid until	Hidden			

TAB: UNITS

Shows the units for the selected product. The tab is only displayed if the corresponding right is set in the backend.

Name	Visible	Sort	Full text	Explanation
Unit	Always	Ascending	Yes	
EAN	Always		Yes	

Name	Visible	Sort	Full text	Explanation
Quantity	Always			
Weight	Landscape			
G-unit	Landscape			
Size	Landscape			
BME	Landscape			
Quantity in order units	Landscape			

TAB: BILLS OF MATERIALS

Shows the products contained in the selected bill of materials product. The tab is only displayed if the corresponding right is set in the backend.

Name	Visible	Sort	Full text	Explanation
Product	Landscape		Yes	
Name	Always	Ascending	Yes	
Quantity	Always			
EAN	Landscape			

TAB: PRICING

Shows the results of the standard pricing, otherwise the tab remains empty.

Name	Visible	Sort	Full text	Explanation
Type	Always		Yes	Price or discount
Condition	Always		Yes	PRL.Condition | KGB.Condition
Priority	Hidden			PRL.Priority | KGB.Priority
Customer number	Hidden			PRL.PriceGroupCustomerNumber | KGB.CustomerNumber

Name	Visible	Sort	Full text	Explanation
Price list	Hidden			PRL.PriceList
Customer group	Hidden			KGB.CustomerGroup
Customer discount group	Hidden			KGB.DiscountGroup
Item discount group	Hidden			KGB.ItemDiscountGroup
Product group	Hidden			PRL.ProductGroup | KGB.ProductGroup
Item number	Hidden			PRL.ItemNumber | KGB.ItemNumber
Client	Hidden			PRL.Client
From quantity	Hidden			PRL.ValidFromQuantity | KGB.ValidFromQuantity
Price	Always			PRL.RetailPrice
Discount	Always			KGB.Discount

Release

From version 17

1. TAB: PRICING

Matrix Entry

Title
Product entry

General

Header

In the matrix entry, the Header corresponds to the definition from the grid area with the following changes:

1. If different products are selected in the matrix, for which the values to be displayed in the header differ, "Multiple selection" is displayed in red instead.
2. + is displayed if none of the selected products are In Basket yet.
3. A pencil is displayed if at least one of the selected products is In Basket.
4. Scrolling in the matrix causes the header to be shown/hidden.

Entry Area

In the matrix entry, the Entry Area corresponds to the known definition with the following changes:

1. If the selection contains products that are already In Basket and these have different values in the fields of the entry mask, these fields are Hidden as they cannot be edited.
2. +/- adjusts the Quantity in the packaging unit that all products have in common (LCM).
3. If multiple products are selected
    1. only the TAB ITEM is shown.
    2. Information from the header is Hidden.
4. The scanner is deactivated in the matrix.
5. Batch management required products are not available in the matrix.

FAQ

Release

Product documents

Title
Product documents "<Produktbezeichnung>"

General

Grid

Click	Swipe	Views
Document Header		1. Table

Column definition

Name	Visible	Sort	Full Text	Explanation
Colour code	Forced			Red: If cancelled
Document type	Visible			
Document number	Visible		Yes	
Document date	Visible	Descending		
Batch	Hidden			
Quantity	Visible			
Price	Visible			
Cancelled	Hidden			
Reason for cancellation	Hidden			

Processing Mass Barcodes

This area is only active if a scanner is set up or the camera scanner has been activated.

Title
Apply Barcodes

General

Functions in the title bar

Icon	Explanation
	Only visible when the grid is visible. Exports the grid to Excel.

Form

Field	Explanation
Barcodes	This field has no label. Barcodes and Product numbers can be entered line by line into this field.
Camera Scanner	If the camera scanner is activated in the Settings, the corresponding camera image is displayed.

Validation

The Barcodes field must be filled in.

Action buttons

Name	Function	Visibility
Apply	Applies all products from the Barcodes field. If products are duplicated or already included in the ORDER, the packaging unit is increased.	

Name	Function	Visibility
Negative Apply	Applies all products from the active Order template or product hierarchy that are not present in the Barcodes field **and** are not in the ORDER.	When Product entry has been accessed via an Order template or via the product hierarchy.

As soon as the promotion button "Apply" or "Negative Apply" is activated, a check of the Barcodes field takes place. All lines without errors are processed.

Lines that lead to an error are then displayed in the following grid.

Grid

Column definition

Name	Visible	Sort	Full Text	Explanation
Scan				The content of a corresponding line from the Barcodes field.
Product				
Name				
Error				The error message explaining why the scan could not be processed.

FAQ

Release

From version 18

1. Initial provision of the function.

Cart entry

Title	Widget	Widget description
Cart		Available: • Order entry

General

Kebab menu (⋮)

Type	Menu item	Explanation
		without product selection the kebab menu is inactive
	Product details	only with product selection
	Product documents	only with product selection
	Create as new item	only with product selection and if the product is already in the Cart

General Information

1. The auto search (during product entry) is deactivated. The search input must be confirmed with the Enter key
2. Only items present in the Cart are loaded.

{{DDN-01@112#bkmrk-header}}

Click	Swipe	Views

Edits the item	1. New 2. Product documents 3. Product details 4. Delete	1. Table

Column Definition

Name	Visible	Sort	Full Text	Explanation
Status	Visible			Status display of the Stock level as icon Green if the Stock level of the product corresponds to >= 8 units. Red if the Stock level is below 8 units.
Picture	VisibleOnlyLandscape			
Product	Visible		Yes	
Name	Visible		Yes	
Status	Hidden			Product status
Quantity	Visible			Shows the quantity in the Cart
Price	Visible			Shows the assigned Unit price
Total	Visible			Shows the item price

Variant selection

- If multiple products are found, the variant selection is displayed
- If a product is selected from the variant selection, the variant selection is closed and the product is loaded.
  - If the item is present in the Cart, it is loaded and the grid scrolls to the item
  - If not present, the found product is loaded, but without Previous/Next and "Save Next" buttons
- Selection/loading of a product removes the "search input"

- If a product is entered from the Cart, the view jumps there

Column Definition

Name	Visible	Sort	Full Text	Explanation
Status	Visible			Status display of the Stock level as icon Green if the Stock level of the product corresponds to >= 8 units. Red if the Stock level is below 8 units.
Picture	VisibleOnlyLandscape			
Name	Visible		yes	
Status	Hidden			Product status
Product	Visible		Yes	
Quantity	Visible			Shows the quantity in the Cart
Price	Visible			Shows the assigned Unit price
Product columns				

Product recommendations

Required licence: AI Module

Product recommendations are determined based on products already purchased or obtained.

Basic configuration - Settings - "AI: Product recommendations"

- Select your preferred source. You can choose between
  - Documents (default)
  - DeDeSales Orders

Basic configuration - Settings - "AI: Product recommendations - Probability"

- Probability in %
- Enter the value here between 0 and 100.

Generation of recommendation data

- Calculation takes place (except for the initial generation) weekly on Sunday nights.
- The basis for determination is all orders of all customers (Documents or DeDeSales Orders).
- Only results whose probability corresponds at least to the configured value are considered.