

Service Description

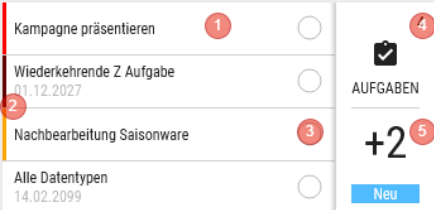
Tasks & CRM

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Tasks

Tasks

Title	Widget	Widget Description
Tasks		<div><div>1. Number of tasks</div><div>2. Top right corner in the colour of the highest priority.</div><div><div>• Prio Z: dark red</div><div>• Prio A: red</div><div>• Prio B: orange</div><div>• Prio C: none</div></div></div> <div>Available in</div> <div><div>• Homepage dashboard</div><div>• Customer details</div></div>

Title	Widget	Widget Description
		<ol style="list-style-type: none"> Shows the first 4 tasks, sorted by Name <ul style="list-style-type: none"> If available, the end date is shown Click in the homepage dashboard: opens "Customers of a task" Click in the customer dashboard: opens the task for the customer. vertical bar on the left <ul style="list-style-type: none"> Prio Z: dark red Prio A: red Prio B: orange Prio C: none Processing status is symbolised by the circle. <ul style="list-style-type: none"> In the customer dashboard <ul style="list-style-type: none"> Empty: non-completed Half: In progress In the homepage dashboard <ul style="list-style-type: none"> The circle is filled proportionally, depending on how many customers have already completed the task. Number of tasks <ul style="list-style-type: none"> Click shows the task summary Number of new tasks since the last transfer <p>Click opens the summary page, but shows only new tasks since the last transfer</p> <p>Available in</p> <ul style="list-style-type: none"> Homepage dashboard Customer details

Customers of a task

Title: "Name of the task"

Lists all customers for whom this task is still open

Grid

Click	Swipe	Views
Opens the task for the customer	1. Opens the customer	1. Table

Column definition

Name	Visible	Sort	Full Text	Explanation
Colour code	ForceVisible			In progress: orange
Customer columns	as with customers	ASC (Name1)	As with customers	
Start	VisibleOnlyLandscape			DD.MM.YYYY
End	Visible			DD.MM.YYYY

Task summary

Title: Tasks

Grid

Click	Swipe	Views
Opens the task		1. Table

Column definition

Name	Visible	Sort	Full Text	Explanation
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Colour code	ForceVisible	ASC		Prio Z: dark red Prio A: red Prio B: orange Prio C: none
Task	Visible		Yes	
Start	VisibleOnlyLandscape			DD.MM.YYYY
End	Visible			DD.MM.YYYY
Open	Visible			<ul style="list-style-type: none"> • shows the number of still open entries • Only via homepage dashboard
Done	VisibleOnlyLandscape			<ul style="list-style-type: none"> • shows the number of completed entries • Only via homepage dashboard
Total	VisibleOnlyLandscape			<ul style="list-style-type: none"> • shows the number of all (open + done) entries • Only via homepage dashboard

Status	VisibleOnlyLandscape			<ul style="list-style-type: none">• Non-completed• In progress• only via customer dashboard
Priority	Hidden			

Task

Title: "Name of the task"

Task form

Button below

Save - Saves the task

Complete - Completes the task, it can no longer be edited

FAQ

Release

CRM

CRM

Title	Widget	Widget Description
<Name of the Query>	<div><div><div><div></div></div><div>CRM - DAT...</div></div></div>	There is one widget per CRM Form in the corresponding Type for which it is valid. For example Contact, Customer, Opportunity etc.

Header

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1. Back without Save
2. Title: "Name of the Query"

Form of the Query

Button below: Save

- Closes Job.

FAQ

Release