Service Description Trip

- Reports
- Travel Report
- Expense report
- Daily Report Comment
- Expenses
- Visit

Reports

Title	Widget	Widget Description
Reports		1. Number of travel reports

General

Kebab menu (⋮)

Type	**Reisekostenabrechnung**	
	Reisekostenabrechnung	

Functions in the title bar

Icon	Explanation
+	Creation of a new Travel report.

Grid

Click	Swipe	Views
Travel report	1. Delete	1. Table

Column definition

Name	Visible	Sort	Full Text	Explanation
Colour code	Forced			Green: Travel report is archived.

Name	Visible	Sort	Full Text	Explanation
Date	Always	DESC	Yes	
Type	Always			Travel day No travel day
Visits	Always			Number of visits on the travel day.
Note	Landscape		Yes	
Start time	Hidden			
Start location	Hidden			
Start km	Hidden			
End time	Hidden			
End location	Hidden			
End km	Hidden			
Car reg. number	Hidden			
Third-party km	Hidden			
Third-party vehicle	Hidden			
Overnight stay	Hidden			
Breakfast	Hidden			
Lunch	Hidden			
Dinner	Hidden			
Expenses	Hidden			Total of documented expenses.

FAQ

Release

Travel Report

Title	Widget	Widget Description
Trip		This widget is displayed when there is no trip for today yet. On click 1. Start is set to the current time. 2. Location is taken from the last end of trip. 3. End km from the last end of trip is taken as start km.
Continue trip		This widget is displayed when a trip for today has already been started and ended. On click 1. End time is deleted.
End of trip		This widget is displayed when a trip has been started.

General

Form

Field	Right	Reference
Date		
Travel day	DAILY REPORT / No travel day	

General

Start and end of trip

Field	Right	Reference
Start		
Start - Location		
End		
End - Location		
Start km	DAILY REPORT / No start/end km in daily report	
End km	DAILY REPORT / No start/end km in daily report	
Non-business km	DAILY REPORT / Non-business km	
Car reg. number	DAILY REPORT / Car reg. number in start/end of day	

Per diem rate

Field	Right	Reference
Use of private vehicle	DAILY REPORT / Third party car	
Overnight stay	DAILY REPORT / Overnight stay	
Breakfast	DAILY REPORT / Breakfast	
Lunch	DAILY REPORT / Lunch	
Dinner	DAILY REPORT / Dinner	

Miscellaneous

Field	Right	Reference
Note		

Visits

Icon	Explanation
+	Creation of a new visit.

Grid

Click	Swipe	Views
Visit	1. Delete	1. Table

Column definition

Name	Visible	Sort	Full text	Explanation
Period	Forced			
Customer/address	Forced			

Expenses

Icon	Explanation
+	Creation of a new expenses entry.

Grid

Click	Swipe	Views
Expenses	1. Delete	1. Table

Column definition

Name	Visible	Sort	Full text	Explanation
Document type	Forced			
Amount	Forced			

Remarks

Icon	Explanation
+	Creation of a new daily report remark.

Grid

Click	Swipe	Views
Daily report remark	1. Delete	1. Table

Column definition

Name	Visible	Sort	Full text	Explanation
Remark	Forced			
Start	Forced			
End	Forced			
Note	Forced			

Validation

1. Exit
   1. Start and end time and location must be stored.
   2. There must not be a second open travel report: "There is already an open travel report on dd.mm.yyyy."
2. Save
   1. If end km is before start km, an enquiry is made.
   2. There must not be a second open travel report: "There is already an open travel report on dd.mm.yyyy."
3. Two travel reports for the same day are not possible.

Action buttons

Name	Function	Visibility
Start	Saves your entries and starts the trip.	Clicked on widget "Start trip".
Continue	Saves your entries and removes the "Ended" status.	Clicked on widget "Continue".
Save	Deletes the end time. Saves your entries.	Clicked on widget "End". The open trip is edited via reports. Created today via reports.
Exit	Saves your entries and ends the trip.	Clicked on widget "End". The open trip is edited via reports. Trip created via reports.
Archive	Saves your entries. The trip can no longer be edited.	A trip before today accessed via reports.

FAQ

Release

Expense report

Title	Widget	Widget Description
Expense report		

General

General Information

A connection to the DeDeSales server is required to create the document "Expense report".

Form

Field	Right	Reference
Period		

Validation

1. All trip reports within the period must be archived.
    1. The following General Information appears: All trip reports in the selected period must be archived. Please archive the following days: ...
    You can, however, create a provisional PDF for reconciliation purposes.

Action buttons

Name	Function	Visibility
Create	Creates an Expense report for the period selected in the Period.	
Cancel	Cancels the process.	Visible only in the General Information window

FAQ

Release

Daily Report Comment

Title	Widget	Widget Description
Comment		

General

Form

Field	Right	Reference
Comment		Code Table: Daily Report Comment
Start		
End		
Note		

Validation

1. End must not be before Start.
2. Comment must be selected.

Action buttons

Name	Function	Visibility
Create	Saves your entries.	When the entry is newly created.
Save	Saves your entries.	When the entry is edited.

FAQ

Release

Expenses

Title	Widget	Widget Description
Expenses		

General

Functions in the title bar

Icon	Explanation
	Addition of Pictures and Files.

Form

Field	Right	Reference
Document type		Code table: Document types for Expense report
Amount		
Document number		a. The suggested value automatically increases by 1 with each entry b. The value can be manually overwritten but must be equal to or higher than the suggested value. c. The document numbers are synchronised with the Sales rep.. In case of a new device installation, the numbers continue to increase based on this.

Validation

1. Document type must be selected.

Action buttons

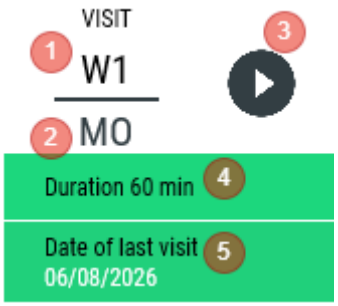
Name	Function	Visibility
Create	Saves your entries.	When the entry is newly created.

Name	Function	Visibility
Save	Saves your entries.	When the entry is being edited.

FAQ

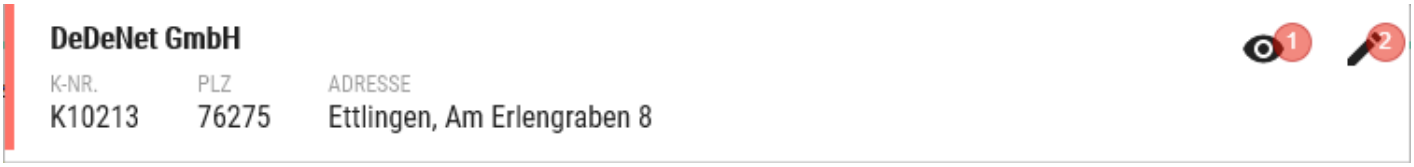
Release

Visit

Title	Widget	Widget description
Visit		1. Visiting frequency 2. Tour 3. Starting and ending the visit 4. Visit duration in the customer master data 5. Last visit recorded and transferred in DeDeSales. Available: • Customer details page • Only available when a trip has been started
Visit		1. Customer location 2. Briefcase, when a visit is ongoing (additionally the icon is shown active (blue)) Available: • Homepage dashboard • Only available when a trip has been started
Visit		If no visit is ongoing: • Opens the customer selection. • Then you reach the visit page. Available: • Homepage dashboard • Only available when a trip has been started

General

Header



1. Calls up the customer (only visible when accessing the entry via Reports)
2. Changes the customer (only visible when creating the entry via Reports)

Form

General

Field	Right	Reference
Start		
End		
On behalf of	DAILY REPORT / visits / On behalf of	Employee
Contact	DAILY REPORT / visits / Contact at Visit conclusion Mandatory	Customer contacts
Campaign		Campaigns
Visit type	DAILY REPORT / visits / Follow-up	

Activities

Field	Right	Reference
Checkbox | Activity	DAILY REPORT / visits / Activities DAILY REPORT / visits / At least one activity must be stated.	Code table: Activities
Checkbox | Miscellaneous	DAILY REPORT / visits Other tasks	

Orders

Grid

Click	Swipe	Views
Order		1. Table

Column definition

Name	Visible	Sort	Full text	Explanation
Date	Forced			
Type	Forced			
ERP no.	Forced			
Order reason	Forced			

Departments

Field	Right	Reference
Checkbox | Department	DAILY REPORT / visits / Departments	Code table: Department

Report

Field	Right	Reference
Single input field	DAILY REPORT / visits / Visit report	

Calendar management

Field	Right	Reference
Only visible if there is also an appointment for the customer on that day and only visible at Visit conclusion	Settings \ Update appointments after visit	Option to set the status and the result

Validation

1. A visit must last at least one minute.
2. End must be present.
3. Tasks with Priority Z must all be Completed.

Action buttons

Name	Function	Visibility
Start	The Start time is pre-filled with the current time. Saves your entries and starts the visit.	When the visit is created via the widget and has not yet been started.
Save	The End time is still empty because the visit is not yet Completed. Saves your entries.	When the already started visit is clicked via the widget.
Complete	• Saves your entries and completes the visit. • Mandatory fields are validated. • Priority Z task check does not take place if the visit is completed via Reports. • A workflow can be started via the kebab menu (only if the "Workflow" module is licensed and there is a corresponding workflow.)	When editing a visit

FAQ

Why is the value from the last visit not current?

The last visit is determined via the Total import. If this has not run, it may be that the value differs from the actual last visit.