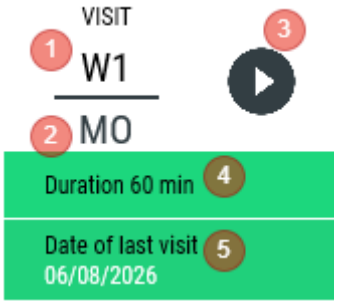
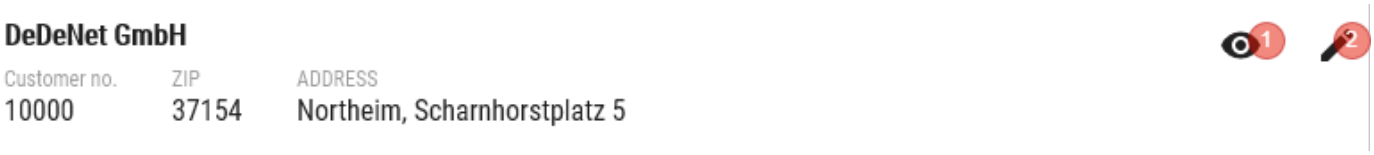
Visit

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.

Revision #11
Created 2026-08-31 09:33:12 UTC by n8n
Updated 2026-11-02 02:21:57 UTC by n8n