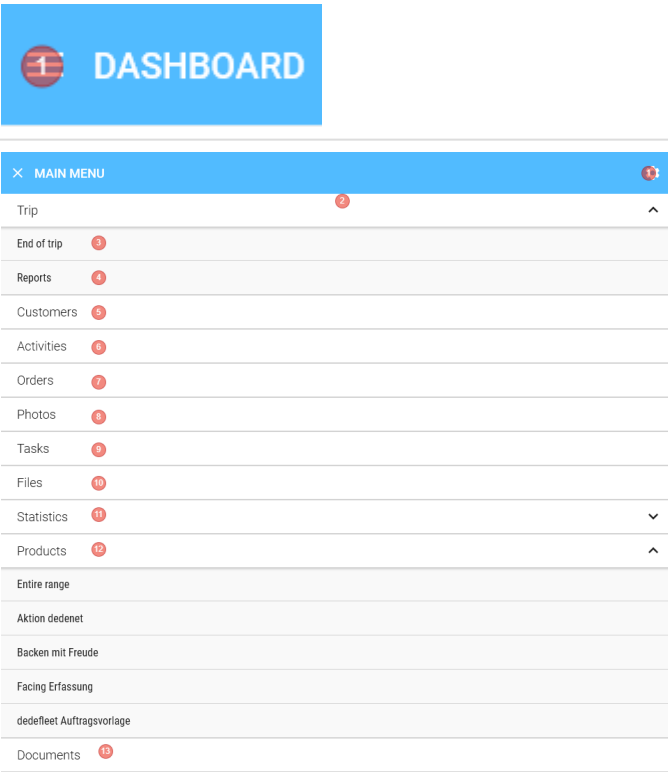


Client Settings (Configuration / Operation after Installation)

- [additional client settings](#)
- [Setup Appointments and Contacts](#)

additional client settings

This area is divided into 2 parts. On the one hand, you have quick access to some functions and on the other hand, you can make settings here.

	<ol style="list-style-type: none">1. The burger menu is only displayed on the dashboard. <ol style="list-style-type: none">1. Settings2. Menu3. Trip<ul style="list-style-type: none">• Start of trip (only shown if no day is running)• End of trip (only shown if the day is running)4. Reports5. Customers6. Activities7. Orders8. Photos9. Tasks10. Documents11. Statistics<ul style="list-style-type: none">• Turnover• KEY DATE12. Products<ul style="list-style-type: none">• Entire range• Favourites• Listing of all Order templates13. Documents
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Settings

	<ol style="list-style-type: none">1. Open the Settings via the burger menu
---	--

For service questions, you will find here, for example, all information that should be provided if necessary.

< EINSTELLUNGEN

▼ Allgemein

▼ Scanner

↻

▼ Produktnummereingabe

▼ Synchronisierung

▼ App-Informationen

▼ Entwicklereinstellungen

SPEICHERN

Panelbar General

1. Title: General
2. Button: QR scanner
 - Only available during initial setup
3. Hide floating numeric input => checking the box hides the floating number field under iOS 26

For more information see [Initial setup](#)

Panelbar Scanner

1. Title: Scanner
2. Icon: Update
 - Check in the [Hardware scanner](#) section whether your scanner is compatible
 - See [here](#) how scanners must be configured for a search.
 - Click the "Update" icon to search for scanners.

- Once the scanner is connected to DeDeSales, you can use it.

Panelbar Product number entry

1. Title: Product number entry
2. DropDown: Numeric | Alphanumeric

Numeric

Displays a numeric keyboard on tablets / smartphones after pressing the magnifying glass in Order entry

- full text search is disabled
- only product number fields are searched
- search must be manually triggered with Enter

Alphanumeric:

Displays an alphanumeric keyboard on tablets / smartphones after pressing the magnifying glass in Order entry

- only product number fields are searched
- search must be confirmed with Enter

Switching

Another click in Order entry ends the numeric/alphanumeric search and activates

- full text search
- automatic search

Panelbar Synchronisation

1. Title: Synchronisation
2. In the Windows client, the client ID can be read for setting up synchronisation in the backend

SubPanelbar: Calendar management

- ToggleSwitch "Export contacts to the Contacts app"

- When activated, appointments from the last 7 days and all future appointments are initially synchronised.
- After the initial synchronisation, all future appointments and appointments from the past two years are kept synchronised. Appointments older than 2 years are removed from the calendar.
- ToggleSwitch "Import calendar app into DeDeSales"
 - Displays the selection of local calendars.
 - Toggled: The checkboxes of the local calendars are displayed.
 - Untoggled: The checkboxes of the local calendars are unchecked and hidden.
- c. Calendar selection
 - Listing of available local calendars which can be selected for synchronisation in DeDeSales.
 - Checkbox: ☐ <Default calendar>
 - Checkbox: ☐ <Calendar 1>
 - Checkbox: ☐ <Calendar 2>
 - Checkbox: ☐ <Calendar 3>
 - Appointments imported into DeDeSales are displayed in the own calendar of the calendar management. Local appointments

SubPanelbar: Contacts

- ToggleSwitch "Export contacts to the Contacts app"
- Which properties are synchronised?
 - Salutation
 - Last name
 - First name
 - Street
 - Postal code
 - City
 - State
 - Country
 - Email
 - Email2 if it differs from Email.
 - Phone
 - Fax
 - Mobile
 - Position
 - Department
 - CompanyName aka (DebtorAddress.Name1 + " " + DebtorAddress.Name2 + " " + DebtorAddress.Name3)
 - BusinessHomePage aka DebtorAddress.HomePage
 - Date of birth
- When are amendments detected?
 - When editing a Contact
 - When deleting a Contact. This option is not available in the client.
 - When creating a Contact

- When saving the setting if the setting "Export contacts to the Contacts app" has changed.
- After receiving the Contacts during Data Transfer
- What happens if the contact is no longer present in the Contacts app?
 - The contact is newly created.
- What are platform-specific differences?
 - iOS:
 - On iOS, we have a list in the calendar named "DeDeSales". This list contains all contacts exported from DeDeSales. A contact coming from DeDeSales also has a relation named "DeDeSales" with a value.
 - Android:
 - On Android, each app (accountType) has its own contact list. If the app is uninstalled, all contacts are also removed.
 - Windows:
 - On Windows, each app has its own contact list. If the app is uninstalled, all contacts are also removed. Contacts are read in batches of 20 contacts.

Synchronisation runs in the background and is only visible by the symbol. It always syncs when a change has been made in DeDeSales and at regular intervals to reconcile the data.

If the symbol is visible, you can display a status by clicking on the symbol.

Changes made in the Contacts app are NOT adopted in DeDeSales.

Panelbar App information

Here you will find more detailed information about the app, which can be helpful in a support case.

Panelbar Developer settings

This panel is only interesting for DeDeNet employees.

Setup Appointments and Contacts

After the [initial setup of the DeDeSales Client](#), you can activate the synchronisation for appointments and contacts as follows.

Access permissions to the external apps are required; if necessary, permission prompts may appear when these settings are configured for the first time.

In the Client Settings under Synchronisation, you have the following options:

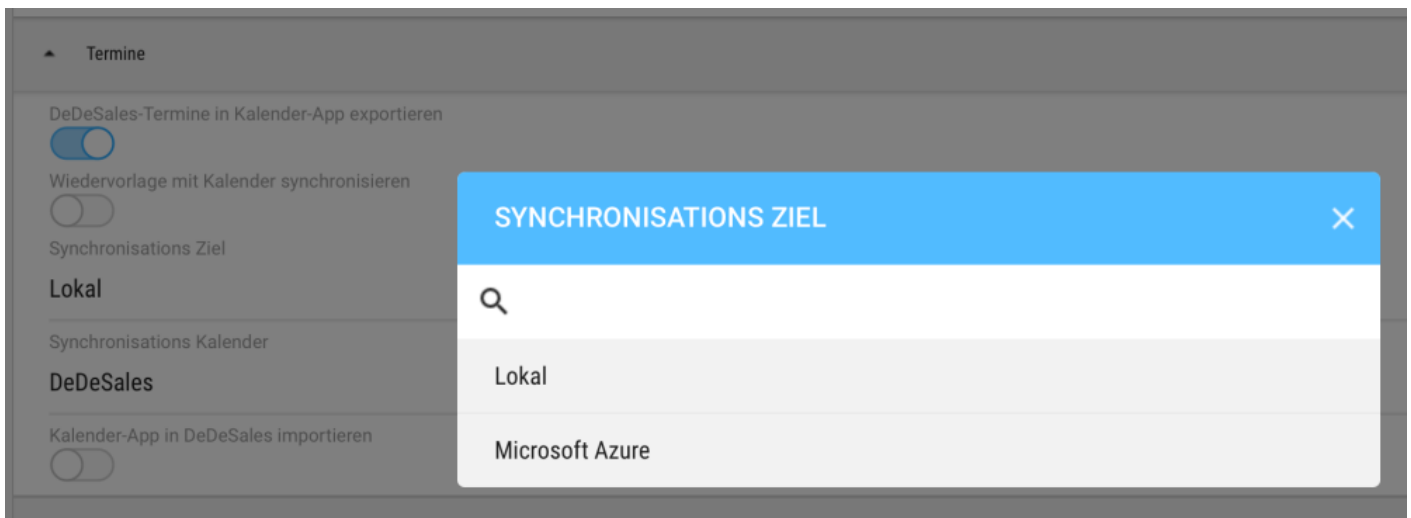


1. Client ID

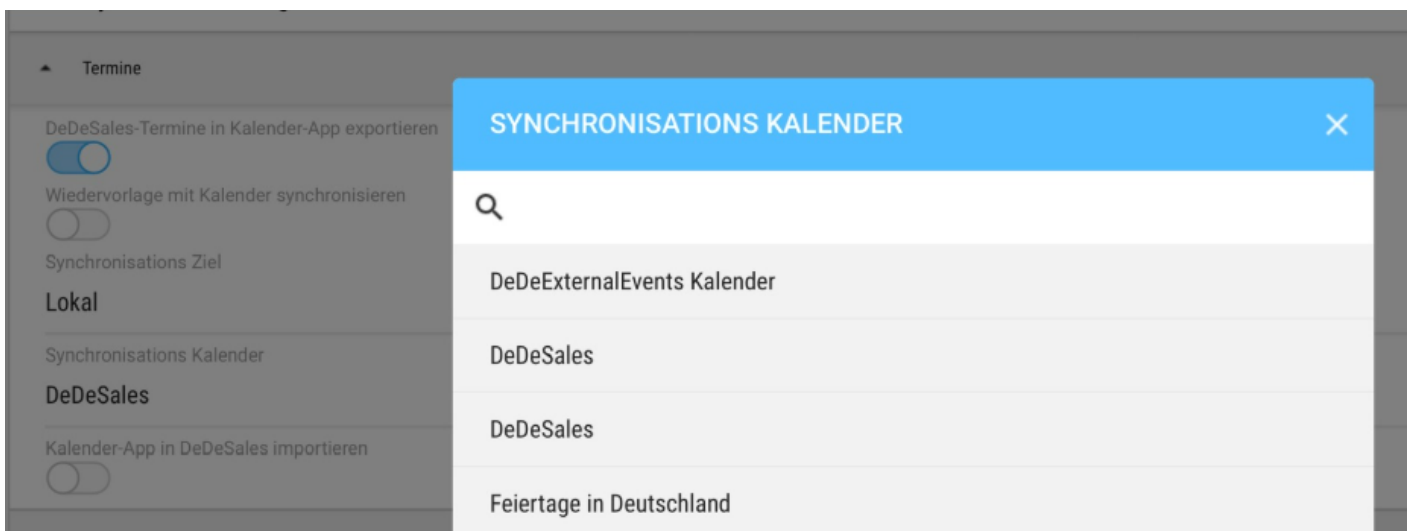
For contact and appointment synchronisation to work under Windows, the following steps are [necessary](#). Here you can determine and copy the Client ID.

2. Appointments

If you activate the option "Export appointments to Calendar app", you can select under Synchronisation target whether the local Calendar app (Local) or, for example, an Exchange account (e.g. Microsoft Azure) should be used. The selection "Synchronisation target" is only available on iOS and Android.



Under Synchronisation calendar, you can select a calendar that is available in the synchronisation target. If you make no selection here, a calendar named DeDeSales will be created. (Rights to create calendars are required)



Under "Synchronise follow-up with calendar" you can activate that appointments for the follow-up from tasks are synchronised with the calendar. The target selection from "Export appointments to Calendar app" is adopted here. If no selection was made there, you can make a target setting here.

Under "Import Calendar app into DeDeSales" you can activate that appointments from an available calendar are imported into the DeDeSales app. After activating, you can select an available calendar.

Kalender-App in DeDeSales importieren

☒

☐	Name
☐	DeDeExternalEvents Kalender
☐	Deutsche Feiertage
☐	Feiertage in Deutschland
☐	Geburtstage
☐	Geburtstage
☐	Kalender

3. Contacts

If "Export contacts to the Contacts app" is active, all contacts will be exported to the Contacts app.

Save / Disable

After you have finished the settings, you can apply them by clicking "Save". After setting up calendar synchronisation, it can only be changed again after you have disabled and re-enabled the setting.

If you disable the synchronisation of appointments, a prompt will appear asking if you want to delete the exported appointments.

TERMIN SYNCHRONISATION

Sollen alle bisher exportierten Termine gelöscht werden?

JA

NEIN