



**PisaSales**

# Quickreference

# User interface

menu bar with submenus

Quickfinder

filter selection

profile menu

counter message/mailbox

general commands

active tab with closing cross

switch favorites desktop on

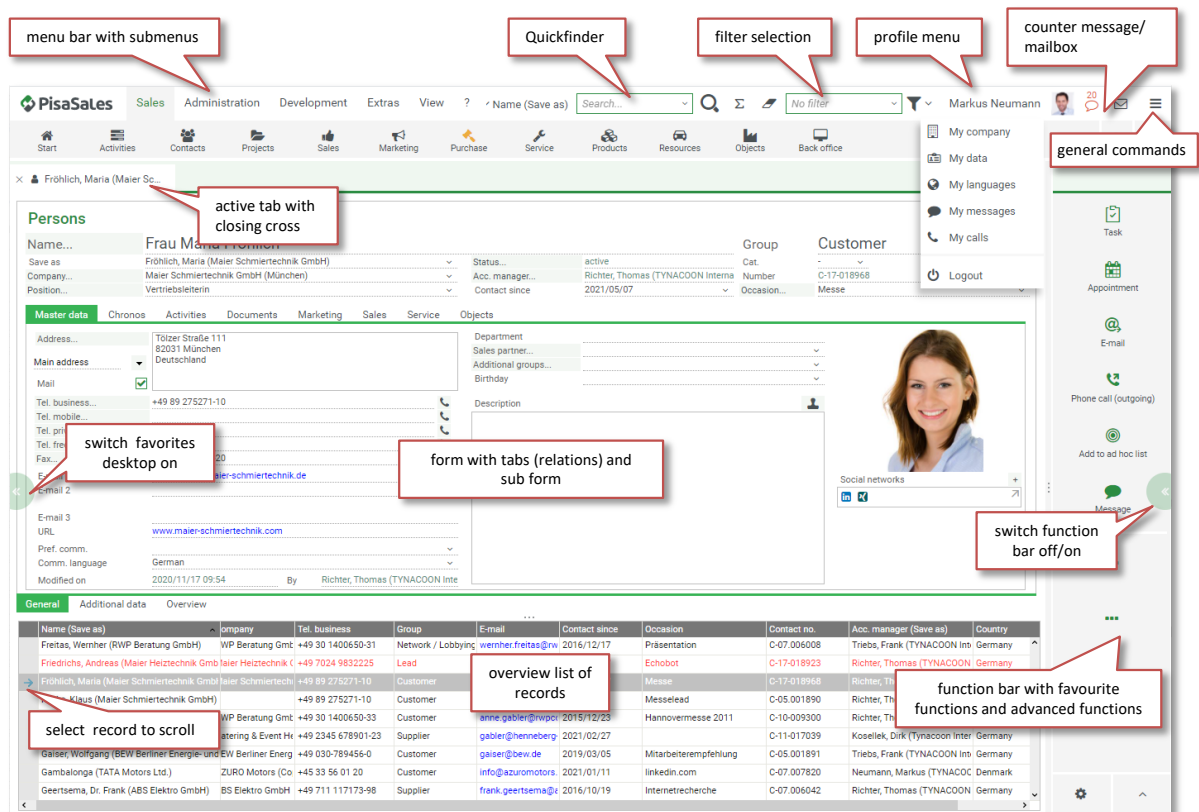
form with tabs (relations) and sub form

switch function bar off/on

overview list of records

select record to scroll

function bar with favourite functions and advanced functions



# Personalize

to personalize topmenu

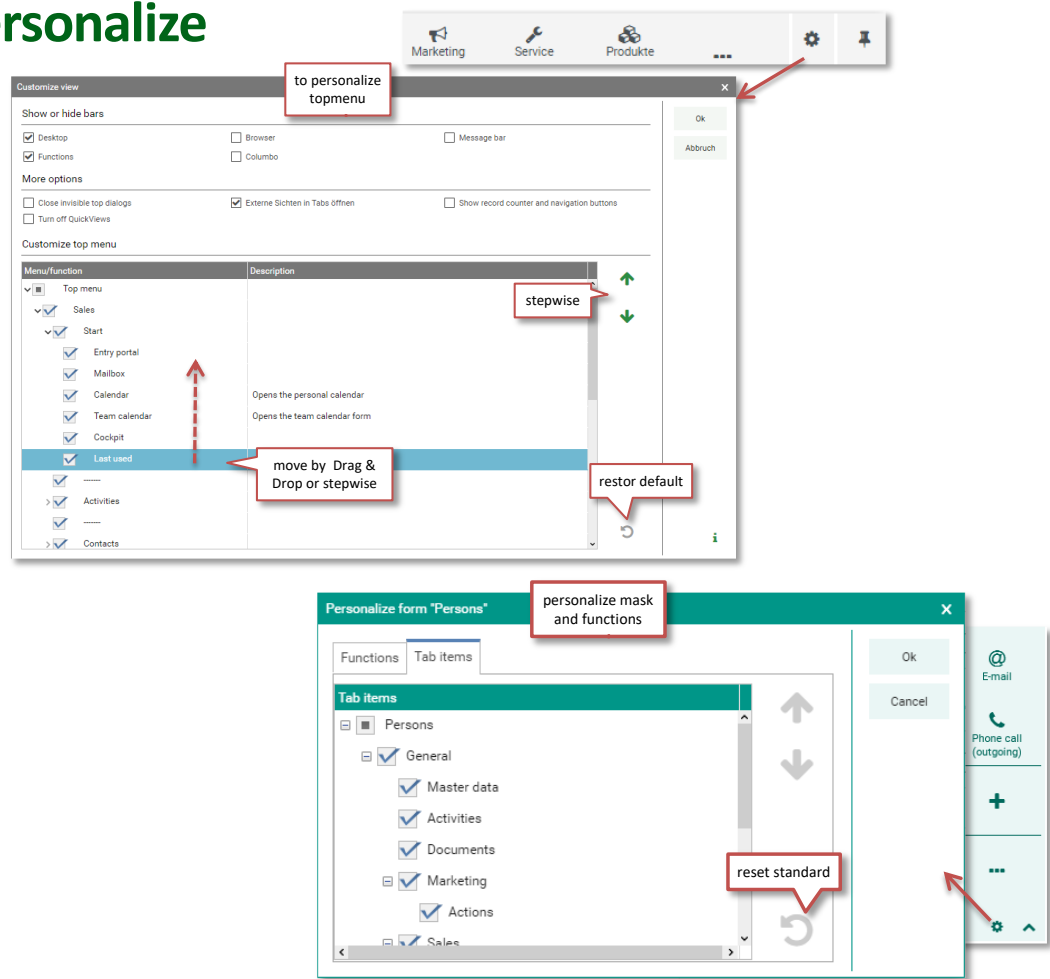
stepwise

move by Drag & Drop or stepwise

restor default

personalize mask and functions

reset standard



## Lists (traditional)

The screenshot displays the SAP CRM interface for ARLAG Turbinen AG. The top navigation bar includes 'Master data', 'Chronos', 'Staff', 'Activities', 'Marketing', 'Sales', 'Service', 'Objects', and 'Documents'. The 'Staff' view shows a list of staff members with search buttons. The 'Activities' view shows a list of activities with a detail form for a 'Remitted meeting'.

**Staff View:**

| Type | Name (Save as)                       | Department       | Position             | E-mail               | Contact since | Occasion  | Tel. business | Note |
|------|--------------------------------------|------------------|----------------------|----------------------|---------------|-----------|---------------|------|
|      | Beyer, Sianne (ARLAG Turbinen ...)   |                  |                      | g-turb...            | 2021/07/27    | Messe     | +49 89 70010  |      |
|      | Fröhlich, Albert (Arlag Turbinen AG) | Geschäftsführung | Prokurist            | froehlich@arlag-t... | 2019/10/18    | Messelead | +49 89 70010  |      |
|      | Hügel, Sybille (Arlag Turbinen AG)   | Geschäftsführung | Assistentin der G... | huegel@arlag-tur...  | 2017/12/27    | Messelead | +49 89 70010  |      |

**Activities View:**

| Type | Status | Start date     | Agent (li) | Subject                                      |
|------|--------|----------------|------------|----------------------------------------------|
|      | ✓      | 21/05/22 14:50 | MT         | Interesting information concerning evolution |
|      | ✓      | 21/05/21 09:00 | TR         | Delivery of the new proto types              |
|      | ✓      | 21/05/04 09:00 |            | We invite to TYNACCOON expo 201x             |
|      | ✓      | 21/04/23 09:00 | JS         | Hints to extended warranty                   |
|      | ✓      | 21/04/03 08:00 | TR         | Suggestion as reference customer             |
|      | ✓      | 21/01/11 16:30 | JS         | Remit installation                           |
|      | ✓      | 20/12/15 12:00 | TR         | ### Bestandskundenbesuch                     |
|      | ✓      | 20/12/04 14:45 | HM         | Confirmation of delivery                     |
|      | ✓      | 20/10/14 08:00 | TR         | Remitted meeting                             |
|      | ✓      | 20/02/28 14:49 | HS         | Initiate credit assessment                   |
|      | ✓      | 20/02/17 06:30 | WM         | Reminder to invoice                          |

**Detail Form for 'Remitted meeting':**

Mi, 2020/10/14 08:00 - Mi, 2020/10/14 18:00  
 Geisenkirchner Str. 47, 86120 München, Deutschland  
 Tynaco Turbinen AG (Richter, Thomas (TYNACCOON International))  
 Project... Folgeauftrag Tynacoon (Planung 2006)  
 \*\*\* RICHTER (TR) \*\*\* 30.03.2021 10:13:  
**Habe dem Kunden zugesagt, unsere Vereinbarung zu erweitern und die neuen Lieferanten termingemäß aufzunehmen.**  
**Orientiert euch bitte hier: -> [Servicevereinbarung 20142 f. Maier](#)**  
 \*\*\* RICHTER (TR) \*\*\* 13.03.2021 15:50:  
**Wichtig!!!**  
 Zuständig: Herr Thomas Richter  
 Teilnehmer:  
[LINCAS Electro Vertriebs Gesellschaft m.b.H.](#)  
 1. Frau Angelika Baron  
 2. Herr Rudolf Angeli

## Lists (compact)

The screenshot displays the SAP S/4HANA 'Activities' app interface. At the top, there's a navigation bar with tabs for Master data, Chronos, Staff, Activities (selected), Marketing, Sales, Service, and Objects. Below this is a filter bar with 'List' and 'View' options, and a 'Company' dropdown. The main area is divided into two sections: a list of activities on the left and a detailed view of a selected activity on the right.

**Activities List:**

- Hints to extended warranty**: 21/04/23 09:00 - 09:30 · Outgoing phone call · +49 89 70010 · Taken
- Suggestion as reference customer**: 21/07/21 15:24 · Outgoing e-mail · Sent
- Remit installation**: 21/01/11 16:30 - 17:00 · Incoming phone call · +49 89 4545
- ### Bestandskundenbesuch**: 20/12/15 12:00 - 12:30 · Appointment · Hagenauer Str. 20, 80999 München, Deutschland
- Confirmation of delivery**: 20/12/04 15:15 · Outgoing letter · Sent
- Remitted meeting**: 20/10/14 08:00 - 1... · E... · Gelsenkirchener Str. 47, 86120 München, Deutschland
- Initiate credit assessment**: 20/02/28 14:49 - 18:00 · Task · Done
- Reminder to invoice**: 20/02/24 07:00 · Incoming letter · Received

**Remitted meeting Detail View:**

**Header:** MI, 2020/10/14 08:00 · MI, 2020/10/14 18:00  
Gelsenkirchener Str. 47, 86120 München, Deutschland

**Project:** Tynacon Turbinen AG · Richter, Thomas (TYNACON International)  
Project... Folgeauftrag Tynacon (Planung 2006)

**Text:** \*\*\* RICHTER (TR) \*\*\* 30.03.2021 10:13:  
  
Habe dem Kunden zugesagt, unsere Vereinbarung zu erweitern und die neuen Lieferanten termingemäß aufzunehmen.  
Orientiert euch bitte hier: -> [Servicevereinbarung 20142 f. Maier](#)

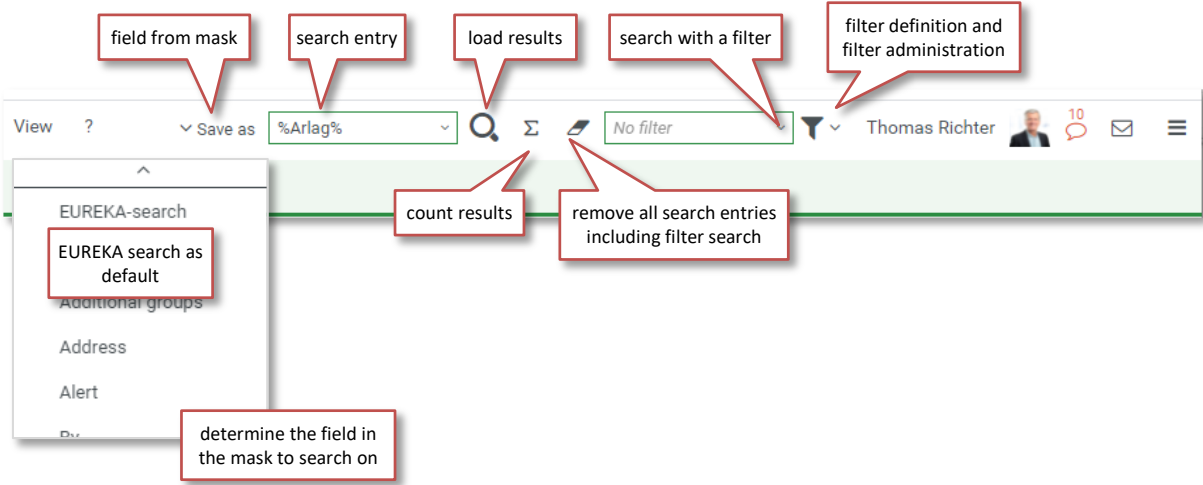
**Text:** \*\*\* RICHTER (TR) \*\*\* 13.03.2021 15:50:  
**Wichtig!!!**  
  
Zuständig: Herr Thomas Richter  
Teilnehmer:  
[LINCSA Electro Vertriebs Gesellschaft m.b.H.](#)

**List:**

1. Frau Angelika Baron
2. Herr Rudolf Angelli

**Footer:** Agenda Besprechung "Produktplanung 2007"

# Search and find data



|                                       |                                                                                                                                                  |
|---------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------|
| Word1 word2                           | Automatically finds all records containing word1 and word2 AND-linked                                                                            |
| Word1 !Word2                          | Finds all records that contain word1, but not word2.                                                                                             |
| (Pipe)                                | OR combination of several words (one must be fulfilled).                                                                                         |
| ! (exclamation mark)                  | NEGATOR, explicitly excludes a word. Operator does not include empty entries. If empty entries are also to be included, add the operators  NULL. |
| '' (two apostrophes) or the term NULL | Search for empty fields (NULL). Tip: !'' or !NULL therefore searches for „non-empty“ fields.                                                     |
| '%Word1 Word2 ...%'                   | Search for an exact match with the character string enclosed in inverted commas within a field entry.                                            |
| '%Word1 and Word2%'                   | Search for so-called phrase, consider apostrophe before/after replacement character!                                                             |

EUREKA-Search

with all words

with any of the words

with the exact word sequence

without the words

limited to the objects

maschinen% messe%

Documents,Marketing actions

Search

Clear

Objects

| Icon              | Object            | Rating | Title                                       | Last modification   |
|-------------------|-------------------|--------|---------------------------------------------|---------------------|
| Marketing actions | Marketing actions | 29     | Hannover Messe                              | 2021/03/09 14:45:18 |
| Marketing actions | Marketing actions | 25     | Hausmesse: TYNACCOON expo                   | 2021/04/23 14:24:29 |
| Documents         | Documents         | 16     | HinweiseZurDemoVM                           | 2018/03/27 13:46:35 |
| Marketing actions | Marketing actions | 40     | INTERPART / INTERPART / SURFACTS / MediPart | 2017/05/02 14:34:07 |
| Documents         | Documents         | 92     |                                             | 2016/11/07 14:21:48 |
| Documents         | Documents         | 94     |                                             |                     |
| Documents         | Documents         | 20     | INTERPART - figures & facts                 |                     |

Preview

INTERPART (INTERPART / SURFACTS / MediPart) | P-06.002698 | Veranstaltung; Event | Messe / Ausstellung  
Karlsruhe | <http://www.kmkg.de> | <http://www.interpart-karlsruhe.de/>  
Einladungen erstellt / Einladung **Messeabend**  
Internationale Fachmesse für Fahrzeug- und **Maschinenbau**, Oberflächentechnik und die Hersteller von medizinischen  
Geräten  
### Internationale Fachmesse für Fahrzeug- und **Maschinenbau**, Oberflächentechnik  
von medizinischen Geräten  
K & R **Messe** GmbH & Co KG (Karlsruhe)  
Siebert, Heinrich (Serviceabteilung)

hyperlink to record

objects to be searched in

preview results

Configuration

Show in form

Objects

Select all

Activities

Briefcases

Budgets

Companies

OK

Cancel

EUREKA-Search - configuration

Restrict object as follows

Fixed default

Remember last restriction

Objects

OK

Cancel

Products

Project folder

Sales cases

Service calls

Service objects

Service orders

Service quotes

Templates

**EUREKA search**  
Global full text search across all objects  
with search options, result ranking,  
search configuration

# To edit data

to cancel the processing and return the data to its original state

to save changes to the database

to save changes to the database and close the active form

to open general commands

to create a new record

duplicates the current or in lists selected records inclusive all structures from the sublists

deletes the current record

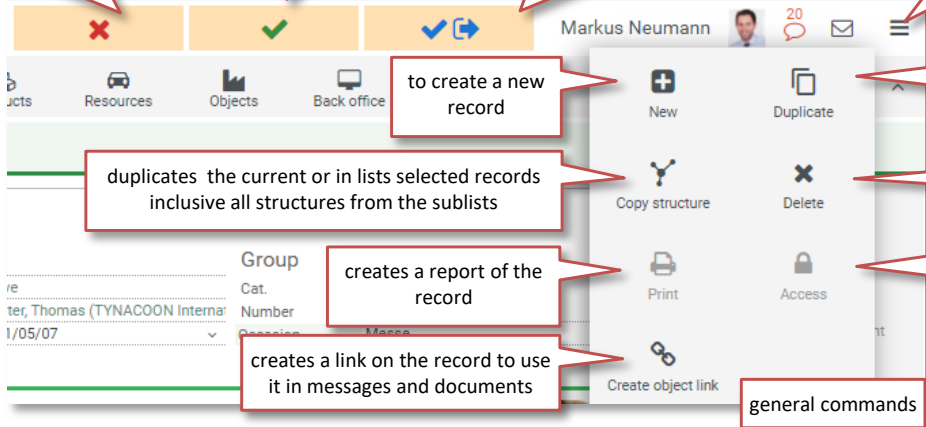
creates a report of the record

creates a link on the record to use it in messages and documents

general commands

opens access management of the current record

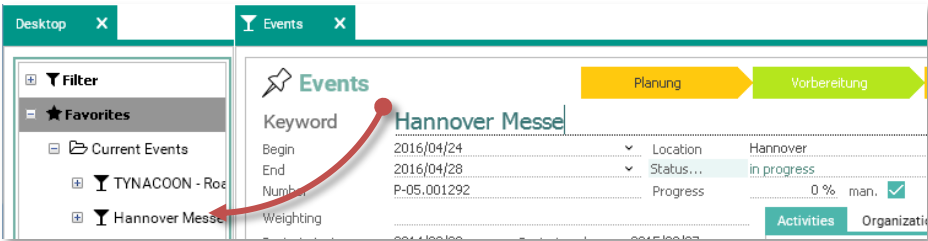
duplicates the current or in lists selected records



## Standard commands

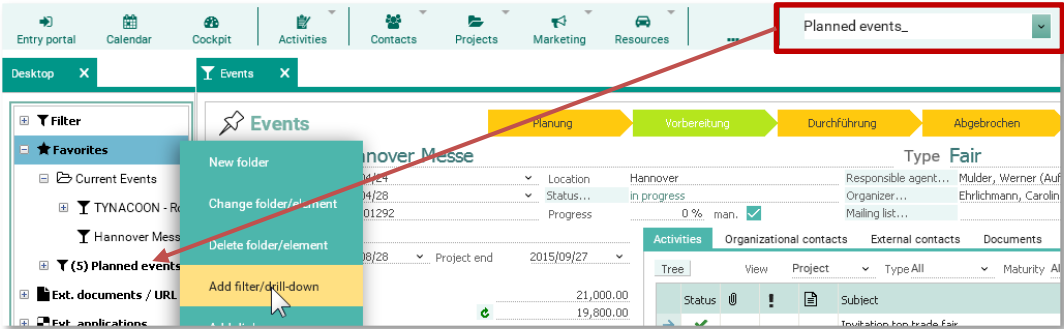
|                                        |          |                                                                                                                                                                                                        |
|----------------------------------------|----------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Load, search, update (at Quickfinder)  | [F5]     | Fills a mask with all records from the database according to search entry. Please never leave search field empty, otherwise server and database are overloaded („empty“ tries to load ALL(!) records). |
| Delete search entries (at Quickfinder) | [Ctrl+U] | Deletes all search entries -> afterwards a new „clean“ search is possible.                                                                                                                             |
| Count (at Quickfinder)                 |          | Shows the number of records found for the search entry without loading them.                                                                                                                           |
| Delete record                          | [Ctrl+D] | Deletes current or selected records in the database after confirmation unrecoverable!                                                                                                                  |

## Store record as favorites (bookmark)



Simple drag and drop a record to the favorites

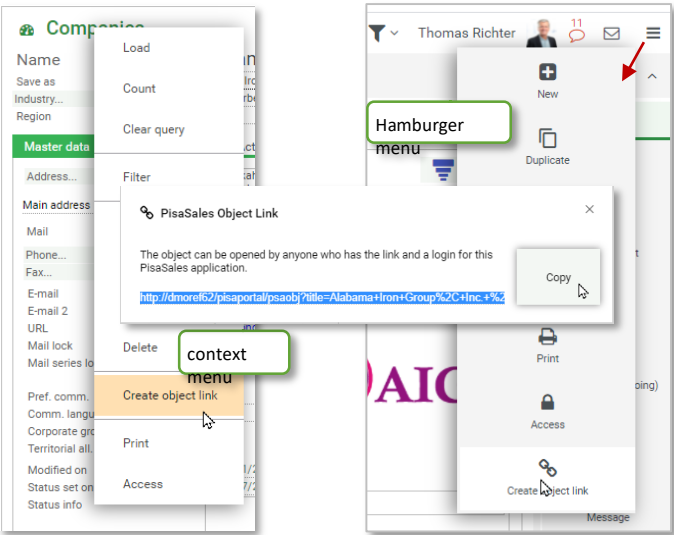
## Store record as dynamic filter (Watchlist)



Run a filter and add it with a right click

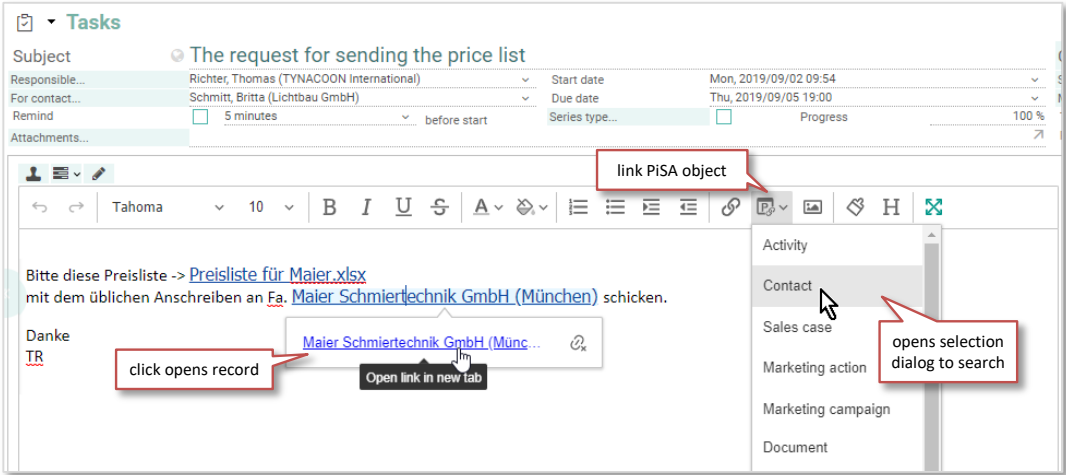
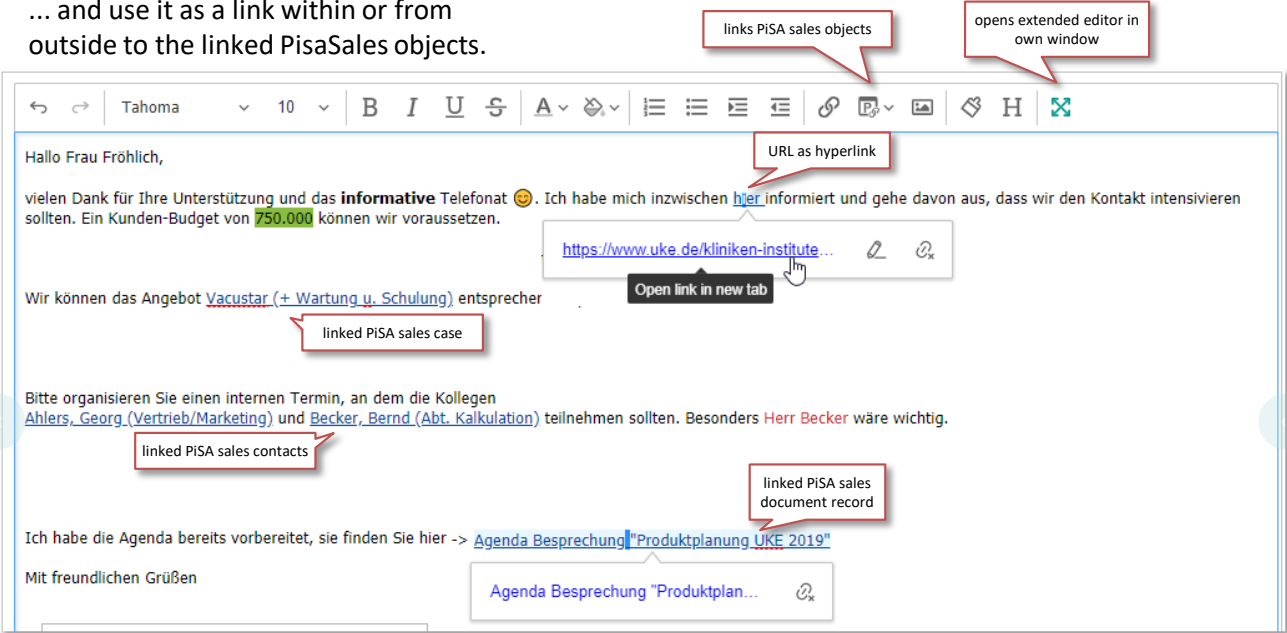
# To edit data

## Object link



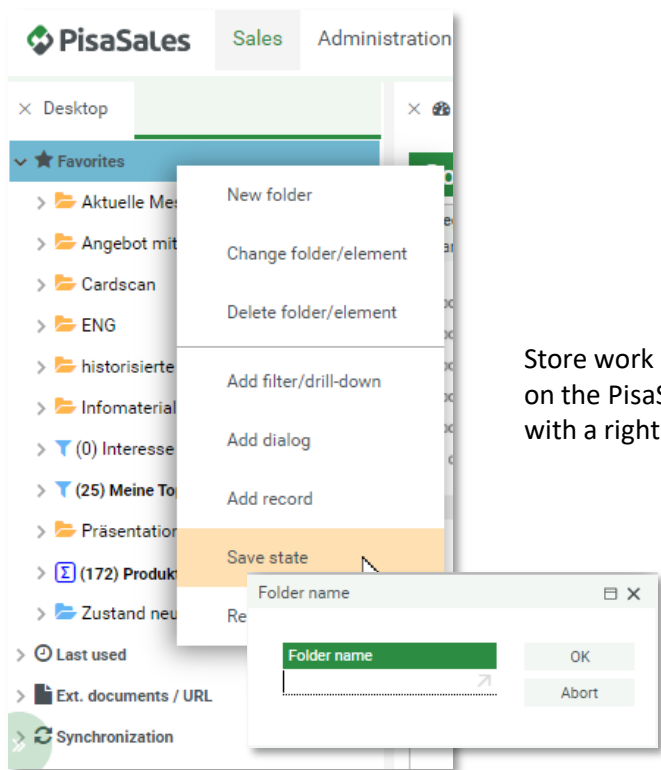
To create hyperlink for arbitrary PiSA sales objects ...

... and use it as a link within or from outside to the linked PisaSales objects.



# Helpful features

## Store working states

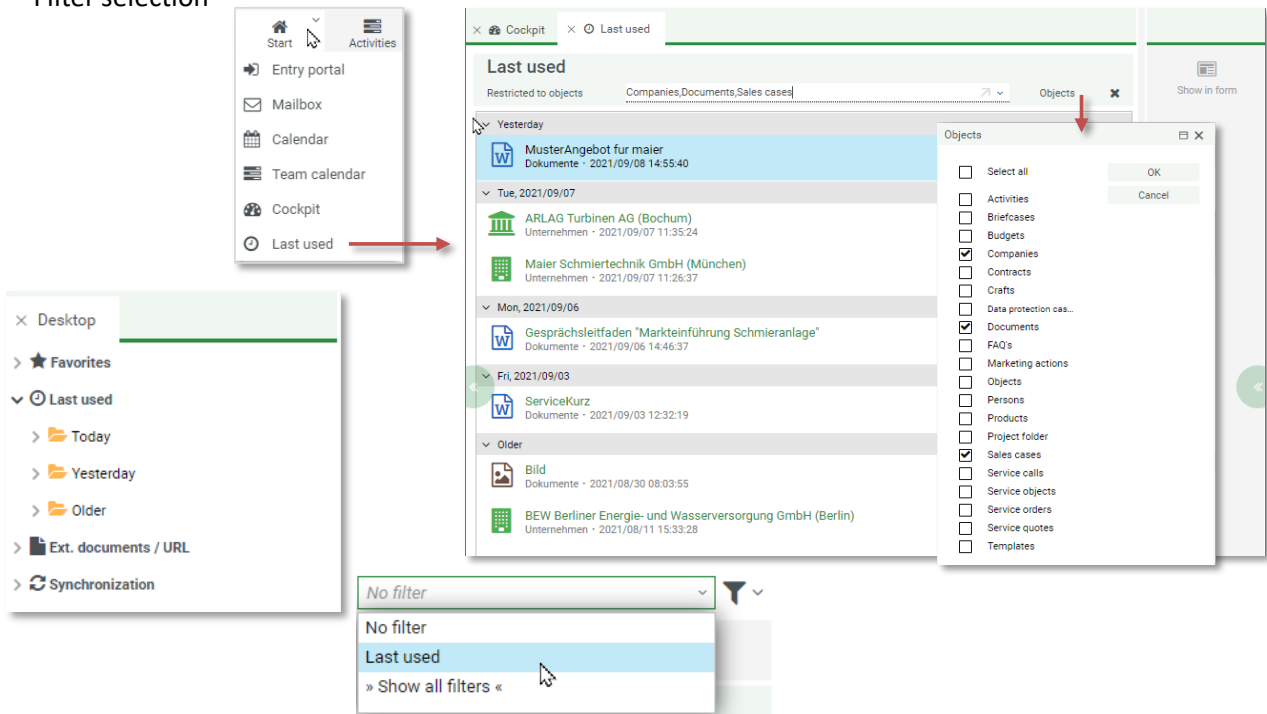


Store work states in your own folders on the PisaSales desktop at any time with a right click

## Last used

Access to history of used objects that have been logged via

- Menu Sales/Start/Last used
- Desktop sidebar
- Filter selection



# Status and data representation

## Standard activity types and their status, delegation of activities

|    | Task✔               | Appointment📅  | Correspondence✉️📧📧📧  | Phone call📞                      |
|----|---------------------|---------------|----------------------|----------------------------------|
| 📄  | Not started         | Planning      |                      |                                  |
| 🕒  |                     |               |                      | in planning/open                 |
| ✉️ |                     |               | Not yet sent/created |                                  |
| 👍  |                     | Firmly agreed |                      |                                  |
| 🚫  |                     |               |                      | Not got through, dial tone, busy |
| ✍️ | In process          |               | In process           |                                  |
| 🕒  | Waiting             |               |                      |                                  |
| ⬅️ | Deferred            |               |                      |                                  |
| ➡️ |                     | Rescheduled   |                      | Rescheduled                      |
| ❌  | Given up            | Canceled      | Failed to send       | Not taken place                  |
| ✅  | Done                | Taken place   | Sent/received        | Taken place                      |
| +  | in post process     |               |                      |                                  |
| ✅  | Follow up completed |               |                      |                                  |

|   |                     |
|---|---------------------|
| 👍 | Delegated           |
| 👎 | Delegated, Refused  |
| 👍 | Delegated, Accepted |
| ✅ | Delegated, Done     |

### Representation of contact types

|    |                               |
|----|-------------------------------|
| 🏢  | Internal company (My company) |
| 👤  | Internal person (employer)    |
| 🏛️ | Corporate group               |
| 🏢  | External company              |
| 👤  | External person               |
| 🏢  | Competitor                    |

### Representation of case types

|   |               |   |               |
|---|---------------|---|---------------|
| 📁 | Opportunity   | 📞 | Event         |
| 📄 | Quote         | ⚡ | Service call  |
| 🔑 | Order         | 📄 | Service quote |
| 🎧 | Telemarketing | 🔑 | Service order |
| 📄 | Publication   |   |               |

### Color of records

|                           |                                                               |
|---------------------------|---------------------------------------------------------------|
| Record green              | Final status, e.g. of cases                                   |
| Field entry green         | Readonly                                                      |
| Record gray               | Does not require further attention due to its status          |
| Record red (generally)    | Special status (inactive, locked, not valid, completed, etc.) |
| Record-red                | Duplicate of a record                                         |
| Activity record red       | Escalated activity                                            |
| Field title red in a mask | Mandatory field, entry required                               |



# Short keys

| Function                                                                                  | Key                              | Context             |
|-------------------------------------------------------------------------------------------|----------------------------------|---------------------|
| Load data corresponding the search entry ("Quickfinder")                                  | [F5]                             | -generally          |
| Save modified record ("Save")                                                             | [Ctrl+S]                         | -generally          |
| Resets changes in the record and closes edit mode (Cancel)                                | [Ctrl+Q]                         | -generally          |
| Insert new record                                                                         | [Ctrl+I]                         | -generally          |
| Duplicate record                                                                          | [Ctrl+J]                         | -generally          |
| Duplicate record with structure                                                           | [Ctrl+Shift+J]                   | -generally          |
| Delete record, delete selected assignment in sub list                                     | [Ctrl+D]                         | -generally          |
| Places the cursor into the Quickfinder (to enter search string)                           | [Ctrl+F]                         | -CLOB field         |
| Set the CLOB field with a toolbar (focus in the field) in the full size edit mode         | [F2]                             | -generally          |
| Set the CLOB field with invisible toolbar (focus in the field) in the full size edit mode | [Ctrl+Alt+T]                     | -CLOB field         |
| Scroll in lists, swap record                                                              | CurDown, CurUp                   | -generally in lists |
| Select record, expand/reduce marker                                                       | Shift+CurDown],<br>[Shift+CurUp] | -generally in lists |
| Delete all search entries in the mask                                                     | [Ctrl+U]                         | -generally          |
| Open filter form for the complex search                                                   | [Ctrl+T]                         | -generally          |
| Expand/close a selection menu at the field                                                | Alt+CurDown/Up]                  | focus in the field  |
| Jump to the next object (field, tab, button...)                                           | [Tab]                            | focus in the field  |
| Jump to the previous object (field, tab, button...)                                       | Shift+Tab]                       | focus in the field  |
| Forward in the history of activated dialogs (as in an internet browser)                   | [Alt+CurRight]                   | -generally          |
| Back in the history of activated dialogs (as in an internet browser)                      | [Alt+CurLeft]                    | -generally          |
| Cut, Copy and Paste for field entries                                                     | [Ctrl+X], [Ctrl+C],<br>[Ctrl+V]  | Cursor in the field |
| Delete characters right beside the current cursor position -in the field                  | [Del]                            | Cursor in the field |
| Place cursor on the first position of the current field [home]                            | [Home] resp.<br>[Pos1]           | Cursor in the field |
| Place cursor on the last position of the current row of the current field                 | [End]                            | Cursor in the field |
| Alternating insert mode (standard) or overwrite mode                                      | [Insrt]                          | Cursor in the field |
| Print report of the current record (Report manager)                                       | [Ctrl+P]                         | -generally-         |

The corresponding combinations with [Pos1], [End], [Pg up] and [Pg down] are also supported.