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2.01.20 Contact Person

The mask contact persons manages all contact persons of the assigned [contacts](#). Information about the department and function of the contact person and the communication possibilities are defined here. A different company address can also be defined in the mask.

The mask consists of the following elements:

Master Sheet

• Basic Information:

- **Contact:** This field refers to the contact person's company.
- **Type:** In the Type field, you can assign the employee relationships of the contact person (for example, external employee, permanent employee, freelancer, contractor, and so on) that are defined in the Collections (see Administration Guide).
- **Form of Address, Title, Name and First Name:** These fields indicate the form of address and/or the title as well as the first and last name of the contact person.
- **Department and Function:** The department and function of the contact person can be entered in these fields.
- **Locked, Lock Reason:** This checkbox allows you to lock the contact person for further use in the system ([project](#), [contract](#)). The reason can be entered in the Lock reason field (for example: no longer employed in this company).
- **Comment:** This field is used to enter remarks about the contact person.

• Address & Communication:

- **Address, Postcode, City and Country:** These fields indicate the complete (business) address of the contact person.
- **Phone, Fax, Mobile and e-mail:** These fields indicate the contact person's availability by telephone (office and mobile), fax and e-mail. Clicking on the e-mail address opens the user's standard mail program with the entered e-mail address.
- **Photo:** A photo of the contact person can be uploaded here.

History

	Datum	Mitarbeiter	ToDo	Bemerkung	abge
1	23.08.2019 10:00	005 Abel Susanne	Anfrage	Anfrage über Homepage	<input checked="" type="checkbox"/>
2	26.08.2019 11:00	009 Behn Frank	Informationsmaterial	Produktbeschreibung versendet, Präsentation angeboten	<input checked="" type="checkbox"/>
3	28.08.2019 10:00	005 Abel Susanne	Terminvereinbarung	Online-Präsentation vereinbart	<input checked="" type="checkbox"/>
4	30.08.2019 14:00	005 Abel Susanne	Präsentation	Sehr gutes Feedback, Präsentation beim Kunden avisiert	<input checked="" type="checkbox"/>
5	11.09.2019 10:00	009 Behn Frank	Kundenpflege	Nachfragen wegen Präsentation vor Ort	<input checked="" type="checkbox"/>
6	18.09.2019 09:30	005 Abel Susanne	Präsentation	Präsentation vor Ort, Angebot angefragt	<input checked="" type="checkbox"/>
7	23.09.2019 12:00	004 Schmidt Norbert	Informationsmaterial	Angebot versendet	<input checked="" type="checkbox"/>
8	28.10.2019 10:00	004 Schmidt Norbert	Präsentation	Präsentation Schnittstellenkonzept	<input type="checkbox"/>
	27.10.2019 00:00	002 Schaub Peter			<input type="checkbox"/>

Nummer	Bezeichnung	Status	Art	von	bis
1 1	Weihnachtsaktion 2019	02 - Aktiv	Roadshow	28.10.2019	20.12.2019

- **Actions:** This element contains all assigned actions for the contact person. The actions are managed in the mask [action](#).
- **Dates:** This element contains all assigned dates for the contact person. The actions are managed in the [appointment calendar](#).
- **Campaigns:** All campaigns that have selected the defined contact person as the target group are transferred here. The campaigns are managed in the [campaigns](#) mask.
- **Meetings:** This element contains all information about meetings.

Professional Details

The screenshot shows a web-based contact management interface. The main window title is 'Ansprechpartner Nahl Lisa'. The interface has a top menu bar with 'Dokument', 'Bearbeiten', 'Ansicht', and 'Aktionen'. Below this are tabs for 'Stammblatt', 'Historie', 'berufliche Details', 'Private Details', and 'Sonstiges'. The 'berufliche Details' tab is active and contains several input fields: 'KAM' (dropdown menu with '005 Abel Susanne'), 'Einstellungsdatum' (calendar icon), 'Vorgesetzte(r)' (dropdown menu), 'Assistent(in)' (dropdown menu with 'Sander Peter'), 'Office' (text input with 'H98'), 'Beruf' (text input with 'Informatiker'), 'Organisation' (text input with 'GPM'), 'frühere Firmen' (text input), and 'weitere Firmen' (text input). Below the 'berufliche Details' is the 'Profile' section with fields for 'Xing', 'Facebook', 'LinkedIn', and 'Google+'. At the bottom is the 'Bekannte Ansprechpartner' section, which is a table with columns: 'Kontakt', 'Name', 'Vorname', 'Telefon', 'Mobil', 'E-Mail', 'Straße', 'PLZ', and 'C'.

- **Career:**

- **KAM:** The key account manager can be added here.
- **Hiring Date:** Here the entry date of the contact person can be entered.
- **Superior and Assistant:** Superiors and the assistant of the contact person can be entered here.
- **Office:** This field indicates the office of the contact person in the contact.
- **Occupation and Organization:** The occupation and organizations of the contact person can be entered here.
- **Former and Further Companies:** If necessary, further and former companies of the contact person are entered here.

- **Profiles:** The contact person's **Xing**, **Facebook**, **LinkedIn** and **Google+** profiles can be linked here.

- **Known Contact Persons:** Any contact persons can be assigned to the defined contact person here. The contact persons are managed in the mask [contact person](#).

Private Details

Adresse & Kommunikation (privat)

Straße privat

PLZ privat Ort privat

Land privat

Telefon privat

Mobil privat

Fax privat

Email privat

sonst. Informationen (privat)

Geburtstag

Hobbys

Name des Partners

Name der Kinder

- **Address & Communication (private):**
 - **Street, Postcode, City and Country:** These fields indicate the complete (private) address of the contact person.
 - **Private Communication Options (Telephone, Mobile, Fax, e-mail Address):** These fields indicate the contact person's availability by telephone (office and mobile), fax and e-mail. Clicking on the e-mail address opens the user's standard mail program with the entered e-mail address.
- **Further Information (private):**
- **Birthday and Hobbies:** Here you can store further private information about the contact person.
- **Name of Partner and Name of Child(ren):** If desired, the name of the partner and the names of the children of the contact person can be entered here.

Miscellaneous

Lieferantenbewertungen

<input type="checkbox"/>	<input type="checkbox"/>	Nummer	Ansprechpartner	Anlegedatum	Titel	Summe Finanzielle	Summe Terminliche	Summe Inhaltliche
<input type="checkbox"/>	<input type="checkbox"/>	1 000001	Nahl Lisa	27.10.2019	Bewertung L.Nahl	9	8	6

technische Einstellungen & Details

- **Supplier Evaluation:** This element enables the suppliers to evaluate, for example: prices or punctuality.
- **Technical Settings & Details:**

- **Receives ICal:** Here you can select whether the contact person receives ICal.
- **Old Record:** If this contact person was created with the “Create Duplicate” action, a reference to the original document is displayed at this point.

Actions

The document class contains the following actions:

- **Print:** This allows you to print the document.
- **Output Report Data:** This action prints the contact data in an Excel overview.
- **Set/Reset Locked Indicator:** This action enables you to lock or unlock the contact person for further use in the system.
- **Change Contact:** This action enables you to change a contact.
- **Create Project:** This action enables you to create a project.
- **Create VCard:** This action allows you to create a VCard.

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