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2.01.21 Action

The mask **action** manages all actions for the contact person of a contact. An action can be dated and commented on by the user. An indicator can also be assigned to show whether this action has been completed. These actions can be evaluated in the [contact evaluation](#).

The mask consists of the following elements:

General Data

Aktion 1.1-4 Nahl Lisa Informationsmaterial

Dokument Bearbeiten Ansicht Aktionen

Stammblatt Sonstiges

Kontakt: CS Consult Systeme AG Ansprechpartner: Nahl Lisa

Projektbezeichnung:

fällig bis: 26.08.2019 11:00 Telefon: 089 / 7312-100

ToDo: Informationsmaterial Mobil: 089 / 12 20 120

Bearbeiter: 009 Behn Frank E-Mail: nahl@consult.de

Ersteller: 002 Schaub Peter abgeschlossen: ☒

Anlagedatum: 28.08.2019

Bemerkung: Produktbeschreibung versendet, Präsentation angeboten

- **Contact, Contact Person:** The alphanumeric field Contact person identifies the contact person and the field Contact the company of the contact person.
- **Project Name:** The project associated with the action is displayed in this field.
- **Phone, Mobile, e-mail Address:** The Phone, Mobile, and E-mail Address fields list the contact person's contact information.
- **Due by:** This field indicates the date by which the action should be completed.
- **ToDo:** This field indicates the action to be performed.
- **Responsible Person:** The responsible person can be assigned to an action. The agents are managed in the mask [employee](#).
- **Completed:** This check box allows to mark an action as processed/completed. Uncompleted actions can thus always be displayed in the [contact overview](#) if desired.
- **Creator:** This field indicates who created this action.
- **Creation Date:** This field indicates the creation date of the action.
- **Comment:** Information on the action can be stored in the comment field.

Miscellaneous



On the tab “ Miscellaneous ” the mask consists of the following elements:

- **technical Settings & Details:**

- **int. Key:** This automatically generated number uniquely identifies the action in the system.

- **Further Information:**

- **Offer:** At this point the offer belonging to the action is displayed.
- **Order:** The order belonging to the action is stored in this field.
- **Sales Funnel:** The sales funnel belonging to the promotion is listed here.

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