2.05.05 Contact Evaluation

The contact analysis generates contact and action lists based on the data of the contact system. For example, all actions of an employee, for a customer or all open actions can be listed here.

The mask consists of the following elements:

1. Name

- **Name:** In this field the name of the evaluation is defined if it is to be saved (for example, for time services or to manage the evaluation results).
- **Evaluation:** The contact evaluation contains the customer evaluation.
- **Report Compilation:** In this field, you can select the new report compilation.

2. Input Data

- **Professional Search:** This selection box allows you to use professional searches for the input data of the evaluation. However, these professional searches must refer to the supported categories.
- **Search Engine: Quick Search and Category:** This element is used to filter the selected data from the categories. The document categories Work package, Employee, Project, Activity and Unit are available for selection. The operation of the search engine is also described in section 3.02.3 and can be executed several times here if necessary.
- **Input Data:** This field lists the selected selection criteria for the evaluation. This input data can come from the professional search, the standard search engine or the personal file.

3. Main Parameters

- **Evaluation Period:** This selection box refers to the evaluation period (Start and End elements) and allows a parameterized definition of the period for the time services. This selection (Current week, Current month, ..., Next week, Last week, ...) can also be used to simplify the manual definition of start and end.
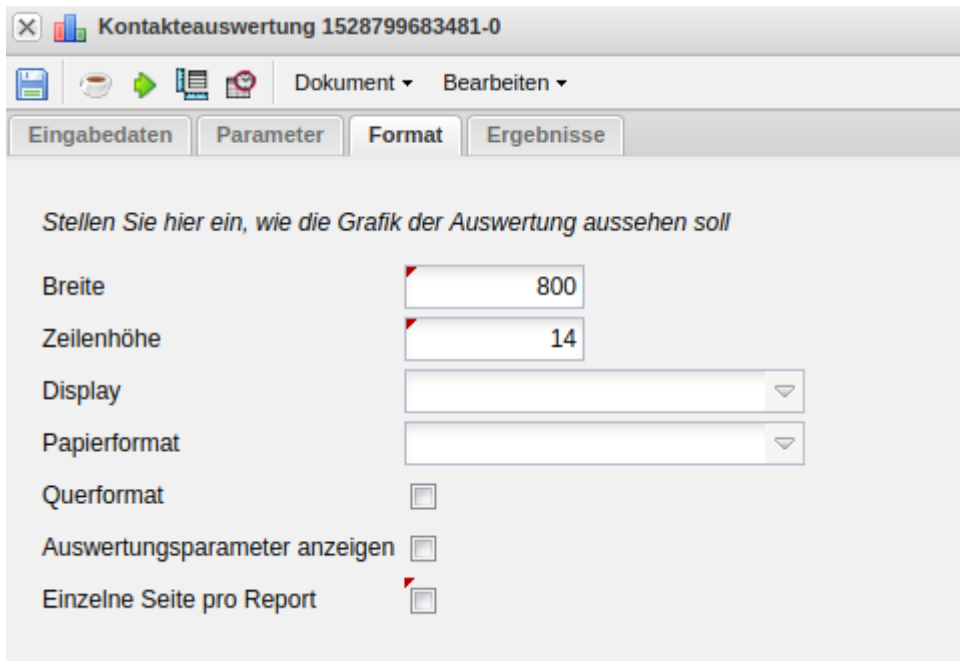- **Start and End:** In these fields, you can enter a time interval as a selection criterion to limit the analysis period for the evaluation.

4. Other Criteria

- **Category:** In this selection box, categories can be selected as selection criteria. These types refer to the category of the sales activity (customer, prospect, ...) and restrict the selection accordingly.
- **Industry:** In this selection box, industries can be selected as selection criteria. These types refer to the industries of the sales activity and restrict the selection accordingly.
- **Period:** In this selection box you can enter the period of the evaluation. The selection offers the following options: Daily, weekly, monthly, semi-annually, annually and per quarter.
- **Action:** In this selection box, you can choose actions as selection criteria.
- **Completed:** In this selection box you can choose Action from the document type action as selection criterion. You can search for all uncompleted tasks, for example.
- **Potential:** In this selection box you can select Potentials as selection criteria. These types refer to the potentials of the contact (for example, A, B or C contact) and restrict the selection accordingly.
- **Reference:** In this selection box, you can select references as selection criteria. These types refer to the reference of the sales activity (for example, business areas) and restrict the selection accordingly.

5. Setting for View

- **Width:** This field defines the width in pixels (px) of the graphic evaluation.
- **Line Height:** This field defines the size of the font in points (pt) for graphical evaluation.
- **Display:** With the help of this selection the generated evaluation can be generated in different formats. Supported formats are HTML (default setting), CSV, XLS, RTF and PDF.
- **Paper Format:** In this selection box, the format of the paper can be specified. Based on the entered size of the sheet, the evaluation is displayed larger or smaller.
- **Landscape:** This option allows the evaluation to be displayed and printed in landscape format.
- **Display Evaluation Parameters:** Here you can select whether the evaluation parameters are to be displayed.

6. Results

This tab contains the maximum number of results and the results of evaluations already performed.