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## 3.1 Basis and master data

In the master data module, all general configurations and the master data of the system are administered. Projectile is freely configurable and parameterisable, you can make the general basic settings yourself according to your company-specific requirements (definition of your cost centres, mileage allowance, currencies, etc.). Changes and alterations can be carried out by your administrator; that saves time and money. Within the module, the contact and employee master data are administered.

The CRM module facilitates the maintenance of your contact data, the definition of campaigns and sales-tuning as well as the management of appointments and actions.

The screenshot displays the CRM module interface, divided into two main sections: 'Kontakt CONSULT Holding' (top) and 'Anspruchspartner Nahl Lisa' (right), with a 'Kampagne' section at the bottom.

**Kontakt CONSULT Holding:**

- CustomerID:** Nummer 1, Kürzel CON
- Firmenname:** CONSULT Holding
- Alter Firmenname:** (empty)
- Organisation:** Kategorie Kunde, Typ Firma
- Übergeordneter Kontakt:** (empty)
- Untergeordneter Kontakt:** 1 - 2 / 2
 

	Firmenname	Adresse	Plz	Ort
1	CONSULT Beratungsgesellschaft mbH	Zaunweg 12	20067	Hamburg
2	CONSULT Software GmbH	Bärenstrasse 45	55120	Mainz
- Anspruchspartner:** 1 - 3 / 3
 

	Name	Vorname	Telefon
1	Müller	Heike	089 / 73 13-103
2	Nahl	Lisa	089 / 73 13-100
3	Sander	Peter	089 / 73 13 105

**Anspruchspartner Nahl Lisa:**

- Nummer:** 1.1
- Kontakt:** Kontakt CONSULT Holding, Typ Festangestellt
- Anrede:** Anrede Frau, Titel Dr.
- Name:** Nahl
- Vorname:** Lisa
- Telefon:** 089 / 73 13-100
- Mobil:** 089 / 12 20 120
- Fax:** 089 / 73 12 - 99
- Email-Adresse:** nahl@consult.de, mailto:nahl@consult.de
- Aktionen:** 1 - 6 / 6
 

	Aktion	To-Do	Datum
1	1.1-1	Anfrage	23.01.2004 00:00:00
2	1.1-2	Informationsmaterial	27.01.2004 00:00:00
3	1.1-3	Terminvereinbarung	02.02.2004 00:00:00
4	1.1-4	Präsentation	03.05.2004 00:00:00
5	1.1-5	Wiedervorlage	02.06.2004 11:00:00
6	1.1-8	Auftrag	14.01.2005 10:00:00

**Kampagne:**

- Bezeichnung:** Roadshow Projectile Version 3.1 03 - Abgeschlossen 01.08.2006 30.11.2006
- Verkaufstrichter:** 1 - 2 / 2
 

	Nummer	Referenz	Potential	Handlungsbedarf	Vertriebsphase	Wahrscheinlichkeit	Auftragseingang	Auftragswert
1	1	Projectile#Version 3.0	A- Potential	Zwingend	06 - Vertragsverhandlung	90,00	01.02.2007	82.000,00
2	7	Schulungen#Projektmanagement	B- Potential	Gering	03 - Informationsmaterial	20,00	15.01.2007	15.000,00

Illustration 4: Master data (CRM module)

In the case of contact data, there is the possibility to allocate freely definable categories for the individual contacts (customers, suppliers, interested parties, internal departments) and define a desired number of contacts. The complete history of the contact to the person can be recorded (telephone calls, correspondence in writing, follow-ups...).

The personnel management supports the administration of all employees and contractual data, skill management and the reproduction of hierarchical organisation structures.

The screenshot displays the 'Mitarbeiter Batzeck Klaus' record in the Projectile-Online-Handbuch. The interface is organized into three main sections:

- Left Panel (Unit Entwicklung):** Shows a list of employees under the 'Unit Entwicklung' and 'Anwendungs- und Systementwicklung'. The list includes names like Müller Julia, Müller Frank, Meier Dieter, Schröder Sandra, Schaub Peter, and Batzeck Klaus.
- Middle Panel (Mitarbeiter Batzeck Klaus):** Displays the details for the selected employee. It includes fields for Personalnummer (034), Aktiver Benutzer (checked), Standard-Benutzerrolle (2 Manager), Unit (1 - 2 / 2), Login (batzeck), Mitarbeiterstatus (Festangestellt), Standort (Frankfurt), Anrede (Herr), Titel (Dr.), Name (Batzeck), Vorname (Klaus), and Sprache (deutsch).
- Right Panel (Fähigkeiten):** Shows a list of skills and languages for the selected employee. It includes checkboxes for 'Tätigkeiten' (Analyse, Beratung, Projektleitung), 'Soft-Skills' (Interkulturelle Kommunikation, Kommunikation, Problemlösung, Teamführung), and 'Sprachfähigkeiten' (deutsch, englisch, französisch).

Illustration 5: Master data (personnel)

Through the definition of actions, the appropriate internal and external cost rates for the project-orientated processes can be stored. Through this, there is also the possibility of invoicing the individual projects according to tasks. The "standard price table" illustrates the definition of these actions. In addition to that, deviating price tables can also be defined for the individual projects or customers.

Projectile also allows for the definition of services or components from outside (products, services, licences, hardware, etc.) for foreign cost tracking. In this way, the purchasing and the (project-orientated) delegation of services from outside are taken into consideration.

From: <https://infodesire.net/dokuwiki/> - **Projectile-Online-Handbuch**

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