

[previous](#) [Home](#) [next](#)

2.01.2 Contact Person

The **Contact Person** form administers any amount of contact persons to the assigned contact. Information about the department and function of the contact persons and the way of communication are defined here. A differing company address can also be defined here.

Tip: For more on this subject see chapter [4.1.04 Contact System](#).

The screenshot shows a web-based form for managing contact information. The form is titled "Contact Williams George" and has a menu bar with options: Document, Edit, View, Back references, and Actions. Below the menu bar are tabs for "Master data", "History", "Office", "Details", "Privat", and "Misc". The "Master data" tab is selected. The form contains several input fields and dropdown menus. The "Number" field is set to "1". The "Customer" field is "Customer TLC Telecommunications Corporation". The "Type" dropdown is set to "Entrepreneur". The "Salutation" dropdown is set to "Mister" and the "Titel" dropdown is set to "Dr.". The "Contact name" field is "Williams" and the "Contact first name" field is "George". The "Department" and "Function" fields are empty. The "Phone number" field is "+44 1234564567" and the "Fax number" field is "+44 1234564567". The "Cell phone number" field is empty. The "Email" field contains "williams@tlc.com" and "mailto:williams@tlc.com" with a green checkmark icon. The "Note" field is empty.

The form consists of the following elements:

On the "Master Data" tab:

- **Number:** This element designates distinctly the contact in System.
- **Customer:** This field refers to the company of the contact person.
- **Type:** In field Type, the in Collections (see Administration Guide) defined employee relation of the contact person (external employee, permanent employee, freelance, employer, etc.) can be assigned here.
- **Salutation, Title, First Name und Last Name:** These fields designate the salutation or/and the title as well as the first and last name of the contact person.
- **Telephone, Mobile, Fax und E-mail Addresses:** This field designates the accessibility of the contact person via telephone (office or mobile), fax and via email. Clicking the email address opens the user's standard email program with their entered email address.
- **Note:** Further comments concerning the contact person can be entered here.

Contact Williams George

Document Edit View Back references Actions

Master data **History** Office Details Privat Misc

Actions

page 1 of 1 1 - 3 / 3

		DueOn	Arranger	Actiontype	Checked	Note
1		20.10.2009 00:00:00	Hahn Katrina	Reminder offer	0	
2		06.10.2009 13:39:09	Hahn Katrina	Incoming order	0	
3		01.10.2009 00:00:00	Timothy Jones	Meeting	0	Reminder

TimeEntries

page 1 of 1 1 - 1 / 1

	Name	Date
1	Meeting	10.06.2009 11:00:00

Campaign

page 1 of 1 1 - 1 / 1

	Description	CampaignStatus	CampaignStart	CampaignEnd
1	Project Sales	active	02.08.2009	30.09.2009

Meeting

page 1 of 1 1 - 1 / 1

	Title
1	Meeting

On the "History" tab:

- **Action:** This element contains all applied actions of the contact person. The actions are administered in the Action form.
- **Time Entries:** This element contains all of the appointments applied to the contact person. The actions are administered in Calendar.
- **Campaign:** Here all campaigns are transferred, in which the defined contact person has been chosen as the target group. The campaigns are administered in the campaign form.
- **Meeting:** This element contains all information about the meeting.

Contact Williams George

Document Edit View Back references Actions

Master data History **Office** Details Privat Misc

Office

Supervisor

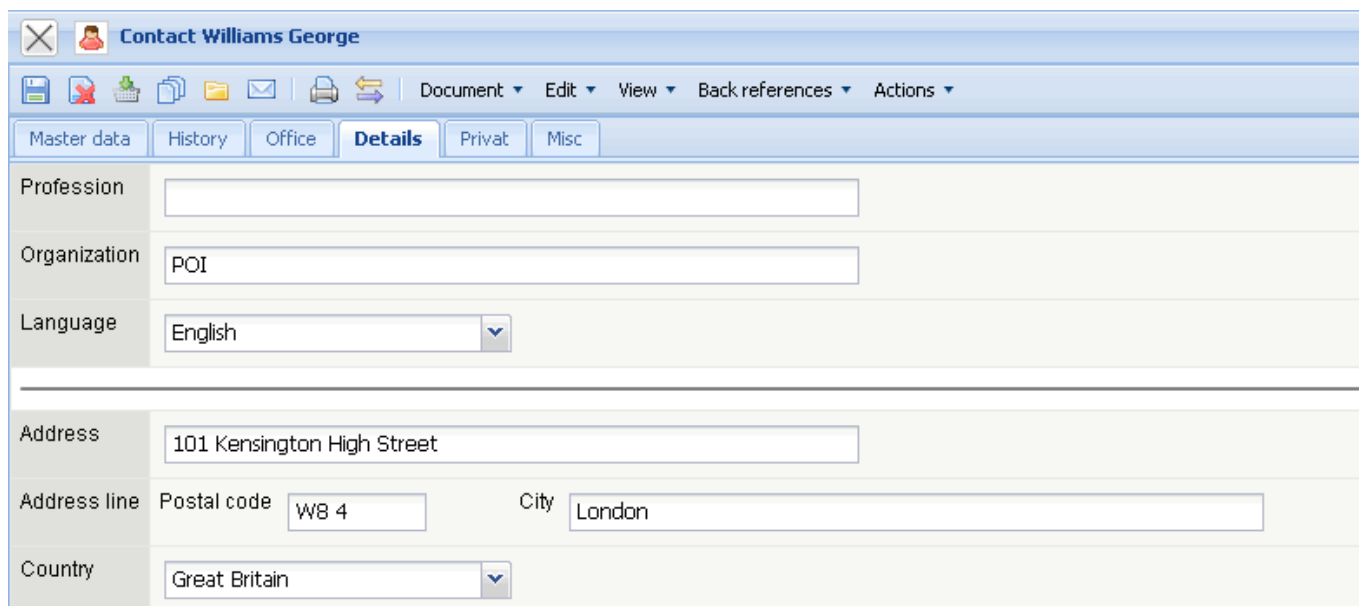
Assistant Williams George

Related contacts

EmploymentDate 01.02.2009

On the “Office” tab:

- **Department, Office und Function:** This field specifies the department, the office and the function for contact persons in Contact.
- **Supervisor and Assistant:** The supervisors and their assistants can be stored here.
- **Related Contacts:** Unlimited amount of contact persons can be assigned to the defined contact person. The contact persons are administered here.
- **Employment Date:** The employment entry date of the contact person can be entered here.



The screenshot shows a web application window titled "Contact Williams George". The interface includes a menu bar with options like "Document", "Edit", "View", "Back references", and "Actions". Below the menu is a tabbed interface with tabs for "Master data", "History", "Office", "Details", "Privat", and "Misc". The "Office" tab is currently selected. The form contains several input fields: "Profession" (empty), "Organization" (filled with "POI"), "Language" (dropdown menu showing "English"), "Address" (filled with "101 Kensington High Street"), "Address line" (split into "Postal code" with "W8 4" and "City" with "London"), and "Country" (dropdown menu showing "Great Britain").

On the “Details” tab:

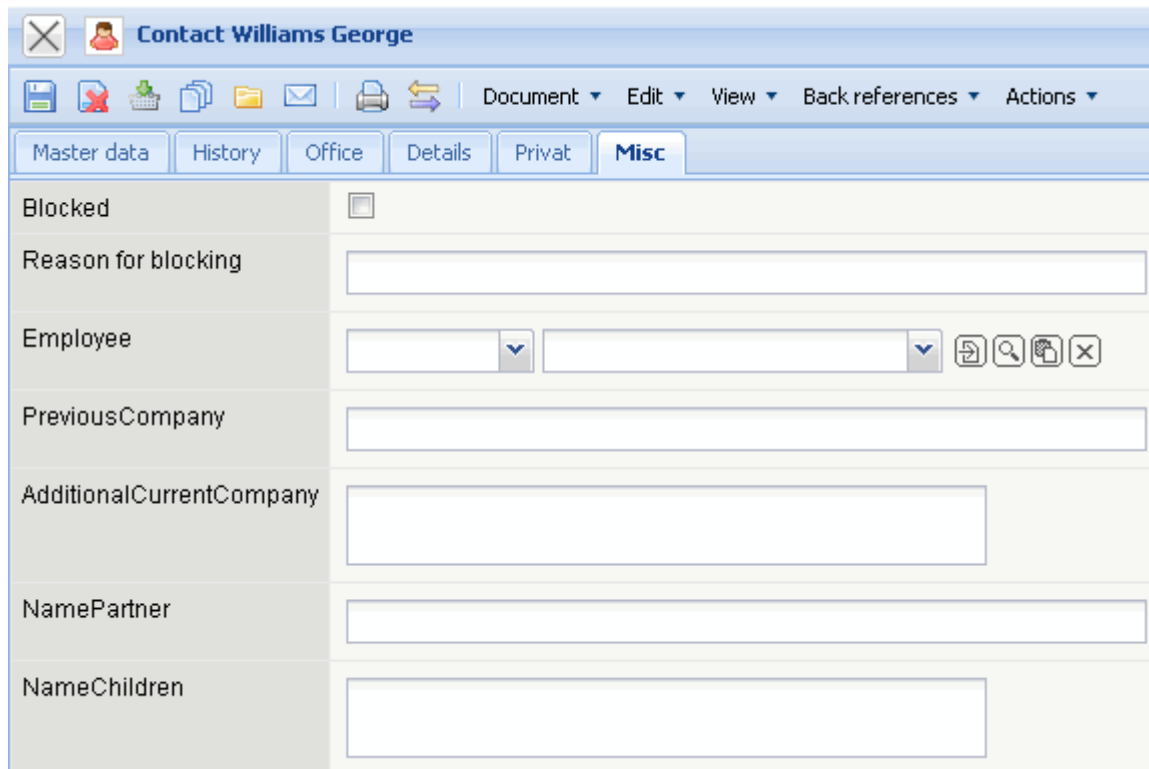
- **Profession and Organisation:** The profession and organisation of the contact person can be stored here.
- **Language, Foreign Language Skills(Occupation):** The language, foreign language skills and occupations/tasks can be stored here. The language can be defined in “Language” in Collections (Administration Guide).
- **Address, Postal Code, City und Country:** This field specifies the complete (business) address of the contact person.

The screenshot shows a web application interface for managing contact information. The title bar reads 'Contact Williams George'. Below the title bar is a menu bar with icons for file operations and a dropdown menu containing 'Document', 'Edit', 'View', 'Back references', and 'Actions'. A tabbed interface below the menu bar shows 'Master data', 'History', 'Office', 'Details', 'Privat' (selected), and 'Misc'. The 'Privat' tab contains several form fields:

- Phone private:** A text input field.
- HandyPrivate:** A text input field.
- FaxNumberPrivate:** A text input field.
- EmailPrivate:** A text input field containing 'george.williams@abc.com'. Below it is a link icon and the text 'mailto:george.williams@abc.com'. A green checkmark is visible to the right of the email field.
- AddressPrivat:** A text input field.
- AddressLinePrivat:** A section containing 'Postal code' and 'City', each followed by a text input field.
- CountryPrivat:** A dropdown menu.
- Birthday:** A text input field containing '12.11.1960' and a calendar icon.
- Hobby:** A text input field containing 'Tennis'.

On the "Private" tab:

- **Private Communication : Telephone, Mobile, Fax, E-mail Address and Web:** These fields specify the accessibility of the contact person via telephone (office and mobile/cell), fax and email. Clicking the email address opens the user's standard email program with the entered email address.
- **Address, Postal Code, City and Country:** These fields specify the complete (private) address of the contact person.
- **Birthday, Wedding Day and Hobby:** Further private information of the contact person can be stored here.



Contact Williams George

Document ▾ Edit ▾ View ▾ Back references ▾ Actions ▾

Master data History Office Details Privat **Misc**

Blocked ☐

Reason for blocking

Employee ▾ ▾ 

PreviousCompany

AdditionalCurrentCompany

NamePartner

NameChildren

On the “Misc” tab:

- **Blocked, Reason:** This check-box allows for blocking the contact person for further use in System (project, contract). The reason for this blocking can be entered in the field Reason (e.g.: not employed in this company any longer).
- **Employee:** This element is for assigning an employee to the defined contact. This employee is responsible for the contact person.
- **Previous and Additional Firms:** If applicable, previous and additional firms of the contact person are entered here.
- **Name Partner and Name of Children:** If applicable, the contact persons name of spouse and the name of children of the contact person are entered here.

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

Permanent link:
https://infodesire.net/dokuwiki/doku.php?id=en:handbuch:kapitel_2:2.01.21_basic_-_ansprechpartner&rev=1255512226

Last update: 2019/10/25 14:09

