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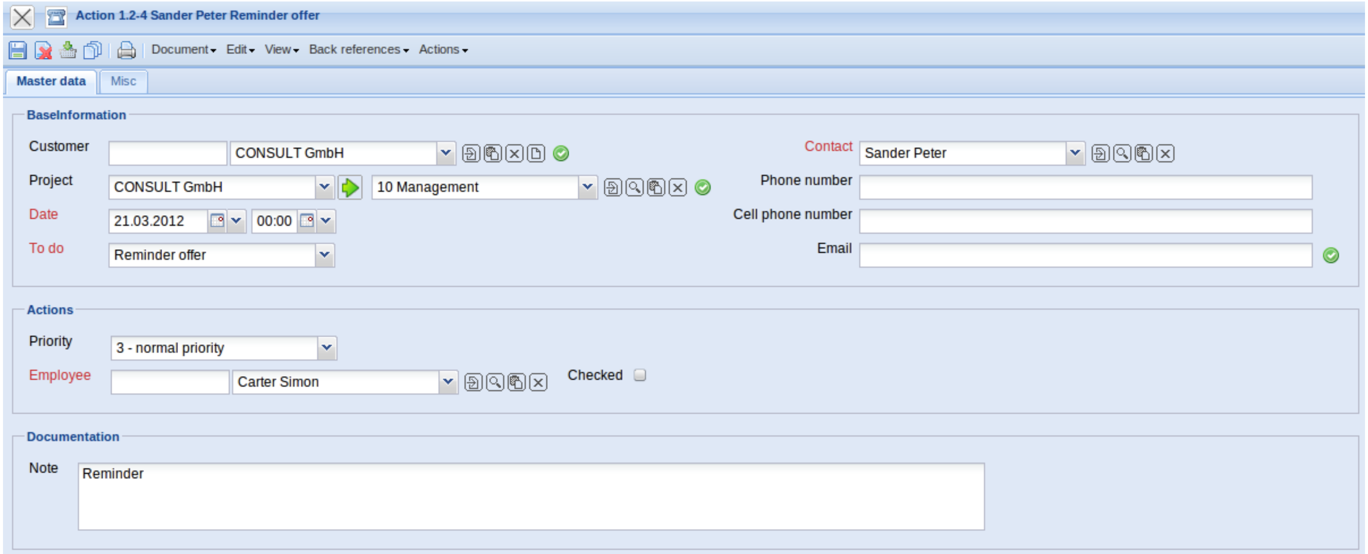
2.01.21 Action

The **Action** form administers all actions concerning the contact person of the contact. An action can be date-stamped and commented on from the employee/consultant. An action can also be marked if it has been completed. These actions can be displayed in Contact Chart.

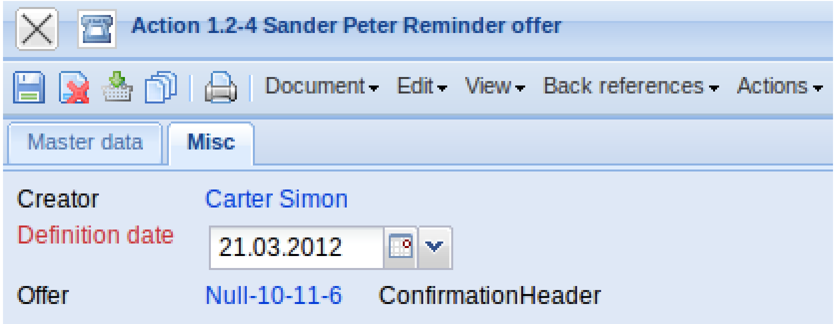
Tip: For more on this subject see chapter 3.11.04 The Contact System.



The form consists of the following elements:

On the “Master data” tab:

- **Action:** The numeric field Action specifies Action distinctly.
- **Customer, Contact Person:** The alphanumeric field contact person specifies the contact person and the firm of the contact person.
- **Project Description:** This field specifies the project corresponding to the action.
- **Due On:** The numeric field Date specifies the date of the action. The current date from the system is used as the default.
- **Action Type:** In the field Action Type the in Collections defined sales and marketing activities and actions or project actions of a business contact can be defined.
- **Priority:** This field specifies the significance of the action; for example to regulate/control the resubmission (actions, which are not yet completed).
- **Arranger:** An action can be assigned to the responsible employee. The arrangers are administered in Employee.
- **Note:** Comments concerning actions can be entered in this field.
- **Completed:** With this check box the action can be marked as processed/completed . Non-completed actions can be displayed if needed in Contact Chart.



On the "Misc" tab:

- **Creator (Employee, Definition Date and Offer):** This field specifies the author of the action and the set-up date for the action.