

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

## 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](#).

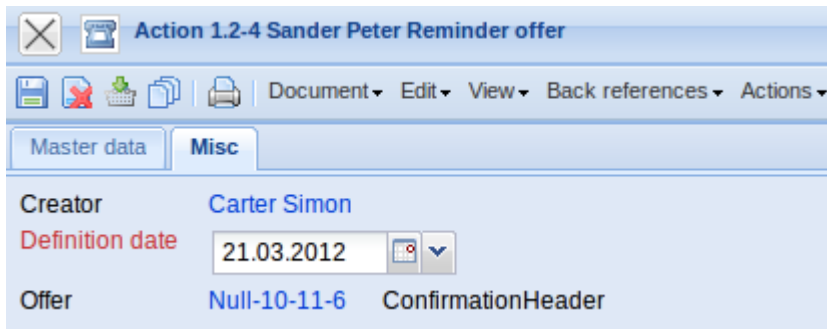
The screenshot shows a web-based form titled "Action 1.2-4 Sander Peter Reminder offer". The form is organized into three main sections:

- BaseInformation:** Contains fields for Customer (CONSULT GmbH), Project (CONSULT GmbH), Date (21.03.2012), To do (Reminder offer), Contact (Sander Peter), Phone number, Cell phone number, and Email.
- Actions:** Contains fields for Priority (3 - normal priority) and Employee (Carter Simon).
- Documentation:** Contains a Note field with the text "Reminder".

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](#).



The screenshot shows a web interface for configuring an action. At the top, there is a title bar with a close button and the text "Action 1.2-4 Sander Peter Reminder offer". Below this is a menu bar with icons for save, delete, refresh, copy, and print, followed by dropdown menus for "Document", "Edit", "View", "Back references", and "Actions". There are two tabs: "Master data" and "Misc", with "Misc" being the active tab. The main content area displays the following fields:

Creator	Carter Simon
Definition date	21.03.2012
Offer	Null-10-11-6 ConfirmationHeader

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.

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

Permanent link: [https://infodesire.net/dokuwiki/doku.php?id=en:handbuch:kapitel\\_2:2.01.22\\_basic\\_-\\_aktion](https://infodesire.net/dokuwiki/doku.php?id=en:handbuch:kapitel_2:2.01.22_basic_-_aktion)

Last update: **2019/10/25 14:11**

