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2.01.22 Action

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

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

The screenshot shows a software window titled 'Aktion 1.1-12 Nahl Lisa Wiedervorlage'. It features a menu bar with 'Dokument', 'Bearbeiten', 'Ansicht', and 'Rückverweise'. The form fields are as follows:

- Aktion:** 1.1-12
- Firmenname:** CONSULT AG
- Ansprechpartner:** Nahl Lisa
- Projektbezeichnung:** CONSULT AG, 41 Einführung Finanzbuchhaltung
- fällig bis:** 06.01.2009, 11:00:00
- Aktionstyp:** Wiedervorlage
- Priorität:** 3 - normale Priorität
- Bearbeiter:** Abel Klaus
- Bemerkung:** Nachfragen
- Abgeschlossen:** ☐
- Erzeuger:** Schaub Peter, 18.12.2008

The form consists of the following elements:

- **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 (Wiedervorlage) (actions, which are not yet completed).
- **Arranger:** An action can be assigned to the responsible employee. The agents/consultants are administered in the Employees form.
- **Comments:** Comments concerning actions can be entered in this field.
- **Completed:** The action can be marked as processed/completed with this check box. Non-completed actions can always be displayed, if needed, in the contact overview.
- **Creator(Employee, Definition Date):** This field specifies the author of the action and the set-up date for the action.

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