

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

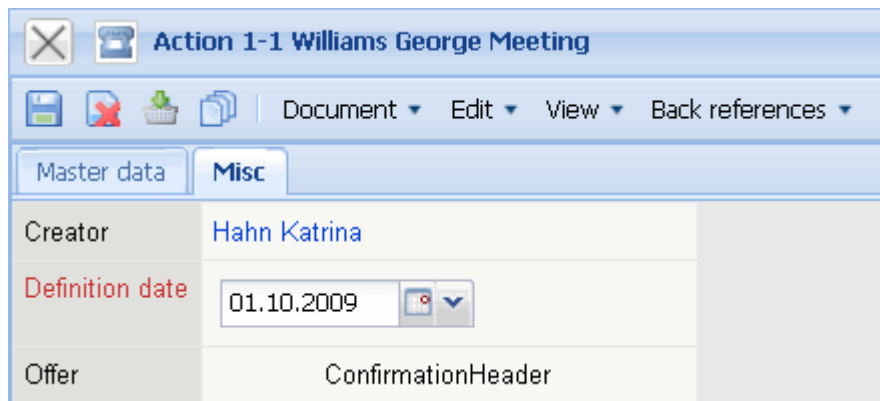
2.01.22 Action

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 [4.1.04 Contact System](#).

Aktion 1.1-12 Nahl Lisa Wiedervorlage	
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	Erzeuger Schaub Peter Anlagendatum 18.12.2008

Action 1-1 Williams George Meeting	
Document Edit View Back references	
Master data Misc	
Action	1-1
Customer	TLC Telecommunications Corporat Williams George
Projectdescription	TLC Telecommunications Corporat 3 Introduction Projectile
DueOn	01.10.2009 00:00:00
Actiontype	Meeting
Priority	3 - normal priority
Arranger	Timothy Jones
Note	Reminder
Checked	☐



Action 1-1 Williams George Meeting	
Document Edit View Back references	
Master data Misc	
Creator	Hahn Katrina
Definition date	01.10.2009
Offer	ConfirmationHeader

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 (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.

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&rev=1254906975

Last update: **2019/10/25 14:09**