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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 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](#).

The screenshot shows the 'Action 1-1 Williams George Meeting' form with the 'Master data' tab selected. The form contains the following fields:

- Action:** 1-1
- Customer:** TLC Telecommunications Corporat
- Contact:** 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:** ☐

The screenshot shows the 'Action 1-1 Williams George Meeting' form with the 'Misc' tab selected. The form contains the following fields:

- 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.

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