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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](#).

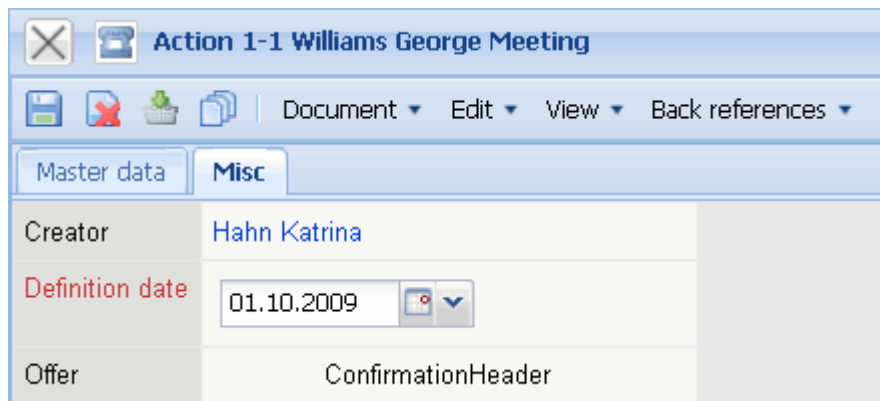
The screenshot shows a software window titled "Action 1-1 Williams George Meeting". It features a menu bar with "Document", "Edit", "View", and "Back references". Below the menu bar are two tabs: "Master data" (active) and "Misc". The "Master data" tab contains the following fields:

- Action:** A text field containing "1-1".
- Customer:** A dropdown menu showing "TLC Telecommunications Corporat".
- Contact:** A dropdown menu showing "Williams George".
- Projectdescription:** A dropdown menu showing "TLC Telecommunications Corporat" and a text field containing "3 Introduction Projectile".
- DueOn:** Two date/time pickers showing "01.10.2009" and "00:00:00".
- Actiontype:** A dropdown menu showing "Meeting".
- Priority:** A dropdown menu showing "3 - normal priority".
- Arranger:** A dropdown menu showing "Timothy Jones".
- Note:** A large text area containing the word "Reminder".
- Checked:** A checkbox that is currently unchecked.

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](#).



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

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