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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](#).

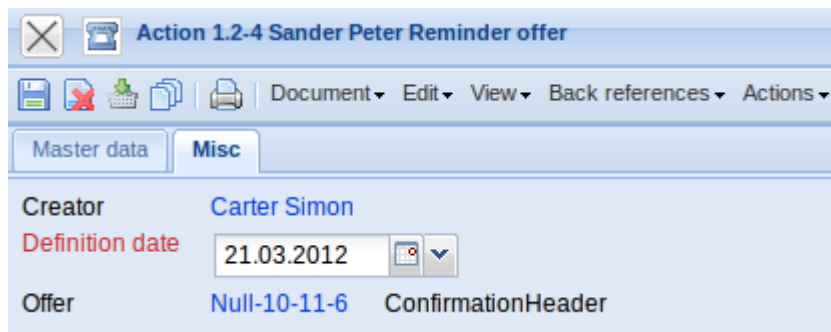
The screenshot shows a web-based form titled "Action 1.2-4 Sander Peter Reminder offer". The form has a menu bar at the top with "Document", "Edit", "View", "Back references", and "Actions". Below the menu bar are two tabs: "Master data" (selected) and "Misc". The "Master data" section is divided into three sub-sections: "BaseInformation", "Actions", and "Documentation".

- 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 form titled "Action 1.2-4 Sander Peter Reminder offer". It has a menu bar with "Document", "Edit", "View", "Back references", and "Actions". Below the menu are two tabs: "Master data" and "Misc", with "Misc" being the active tab. The form contains 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.

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