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# 2.5.05 Contact Chart

The contact chart generates contact lists and action lists based on the data of the contact system. For example, all actions of an employee, actions for a customer or all open actions can be listed here.

**Tip:** For more on this subject see chapter 4.5.05 Contact Chart.

🔀 🛜 📇 Kontaktauswertung						
Erzeugen einer Auswertung Dokument Bearbeiten Ansicht						
Eingabedaten Parameter Format Ergebnisse						
Name: Wenn Sie die Kriterien der Auswertung speichern möchten, geben Sie einen Namen an Name 2						
Bezeichnung Kontaktauswertung						
Auswertung Kontaktauswertung V						
Report-Zusammenstellung						
<b>2. Eingabedaten:</b> Stellen Sie die Dokumente zusammen, für welche die Auswertung erzeugt werden soll. Benutzen Sie dazu (ggf. mehrfach) diese Suchmaschine Profisuche						
Schnellsuche Kategorie						
batz Mitarbeiter 🗾 🔍						
Eingabedaten						
V V 1 □ M Kontakt CONSULT GmbH						
2						
3 🗆 🤱 Mitarbeiter Müller Frank						
4						
3. Hauptparameter: Stellen Sie hier die wichtigsten Parameter ein:						
Auswertungszeitraum						
Start						
Ende						

The form consists of the following elements:

### 1. Name

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Conta	ct chart 1 Contact chart		
Gene	rate chart   🧝 🎂 🏐   Document 🔹 Edit 👻 View	<ul> <li>Back references</li> </ul>	
InputData Para	meters Format Results		
1. Name: If you w	ould like to save a chart please enter a descr	ription	
Name	1		
Description	Contact chart		
Chart	Contact chart 🔍 🥥		
Report Selection	~		
2. Input data: <i>To</i> g please use the se	gather all the documents relevant for the char earch engine (if need be repeatedly)	rt	
Search			
AllClosedActions	•		
Search word		Category	
			▼ 🔍

- **Name:** In this field the name of the chart is defined, if this should be saved (for example, for time services or for administrating the chart results).
- **Description:** In this field the description of the chart is defined, if this should be saved.
- Chart: The evaluation block contains the contact chart.

# 2. Input Data

- **Search:** It is possible to search for data for the chart with this selection box. This search entry must relate to the supported catagories.
- Search Machine: Search Word and Category: This element is used to filter the selected data from the categories. Only the document type contact person, contact, employee and project is available for selection. How to operate the search machine is described in chapter 3.2.2.3 and can be performed, if necessary, a multiple amount of times.
- **Input Data:** Under this field, the selected selection criteria for the chart are listed. This input data can derive from the "professional search"(Profisuche), the standard search machine or the personal clipboard.

#### 3. Main Parameters

Input data					
🧔 No entri	es 🔹				
0.14	Diana				
3. Main paran	neters: <i>Please</i>	select parameters:			
Chart period	Last week		~		
Start	20.02.2000				
	20.08.2009				
End	26.08.2009	<b>•</b> •			

• **Chart Period:** This drop-down box refers to the chart's time span (elements start and end) and allows a parameterised definition of the time span for the time services. This selection (current

week, current month, ..., next week, last week, ...) can be also used to simplify the manual definition of start and end.

• **Start and End:** In this field a time interval can be entered as selection criteria to limit the given period for the chart.



# 4. Further Criteria

- **Category customer :** Categories can be selected as selection criteria with this selection list. These categories refer to the category of the contact (customer, prospective customer, ...) and limit the selection.
- **Branch:** Branches can be selected as selection criteria with this selection list. These categories refer to the branches of the contact and limit the selection.
- Action: Actions can be selected as selection criteria with this selection list.
- **Checked:** Checked can be selected as selection criteria with this selection list through the document type action. Fro example, all not completed tasks can be searched for.
- **Potential:** Potential can be selected as selection criteria with this selection list. These categories refer to the potential of the contact (for example A-, B- or C-Contact) and limit the selection.
- Reference: References can be selected as selection criteria with this selection list. These

categories refer to the category of the contact and limit the selection.

🔀 🥐 🛃 Kontaktauswertung								
Erzeugen einer Auswertung Erzeugen einer Auswertung Dokument Bearbeiten	Ansicht							
Eingabedaten Parameter Format Ergebnisse								
5. Einstellungen zur Ansicht: Stellen Sie hier ein, wie die Grafik der Auswertung aussehen soll								
Breite	800 px							
Zeilenhöhe	14 pt							
Display	XLS 🔽							

# 5. Adjustment of Chart Display

Contact char	t 1 Contact chart			
Generate ch	art			
	🏝 🗊   Document 🔹 Edit 👻 View 🔹 Back references 🔹			
InputData Parameters	s Format Results			
5. Adjustment of chart of	lisplay. Please adjust here the dimension of the chart			
Width	800 p×			
Line height	14 pt			
Display	CHART			
Paper Size	~			
Landscape Mode				

- Width: The width in pixel (px) is determined for the graphical chart in this field.
- Line Height: The size of the font in points (pt) is determined for the graphical chart in this field.
- **Display:** The generated chart can be generated in various formats with this selection. HTML (standard setting), CSV, XLS (MS Excel), PDF, RTF (text processing) are supported.

#### 6. Results

The results of the already processed chart are found in this tab.

