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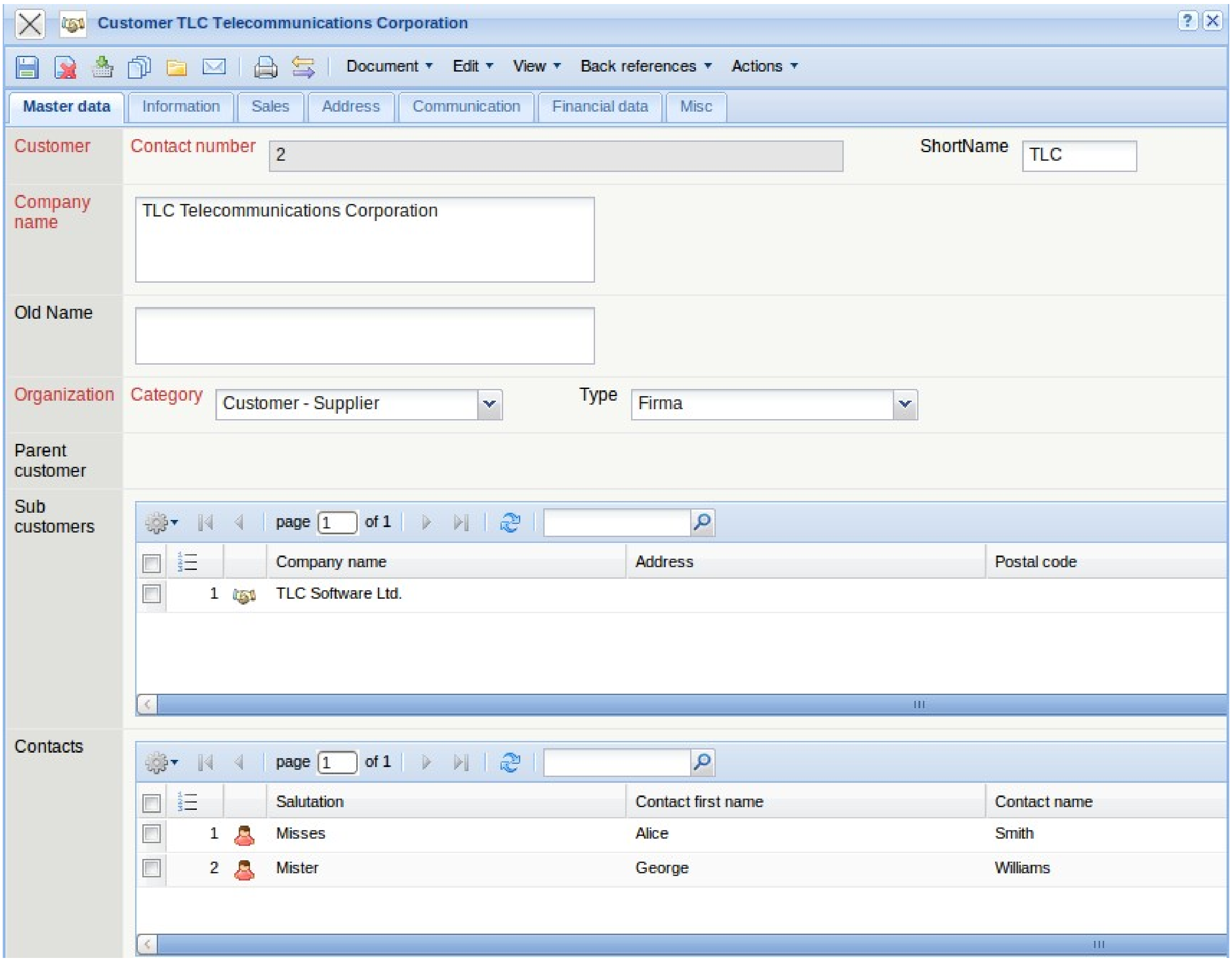
3.11.04 The Contact System

The contact system in Projectile consists of the document types customer, contact person, action and the customer chart.

The document type customer manages all contacts of the company with their contact persons. Customers can be customers, prospective customers, suppliers, etc.. Each customer can be assigned any amount of contact persons. The contact persons can be (for example, be assigned to the project acquisition) assigned user-defined actions.

Customer Data

The document type “customer” administers the business contacts of the customers, suppliers and misc. business partners.



When a new customer is created, several fields are automatically pre-populated. In the standard version of Projectile are the:

- **Number:**The contact number is pre-populated from the system, but can be changed by the user.
- **Country:** Pre-populated with the country of the location.
- **Language:** Pre-populated with the language of the location.
- **Currency:** Pre-populated with the standard currency of the company.

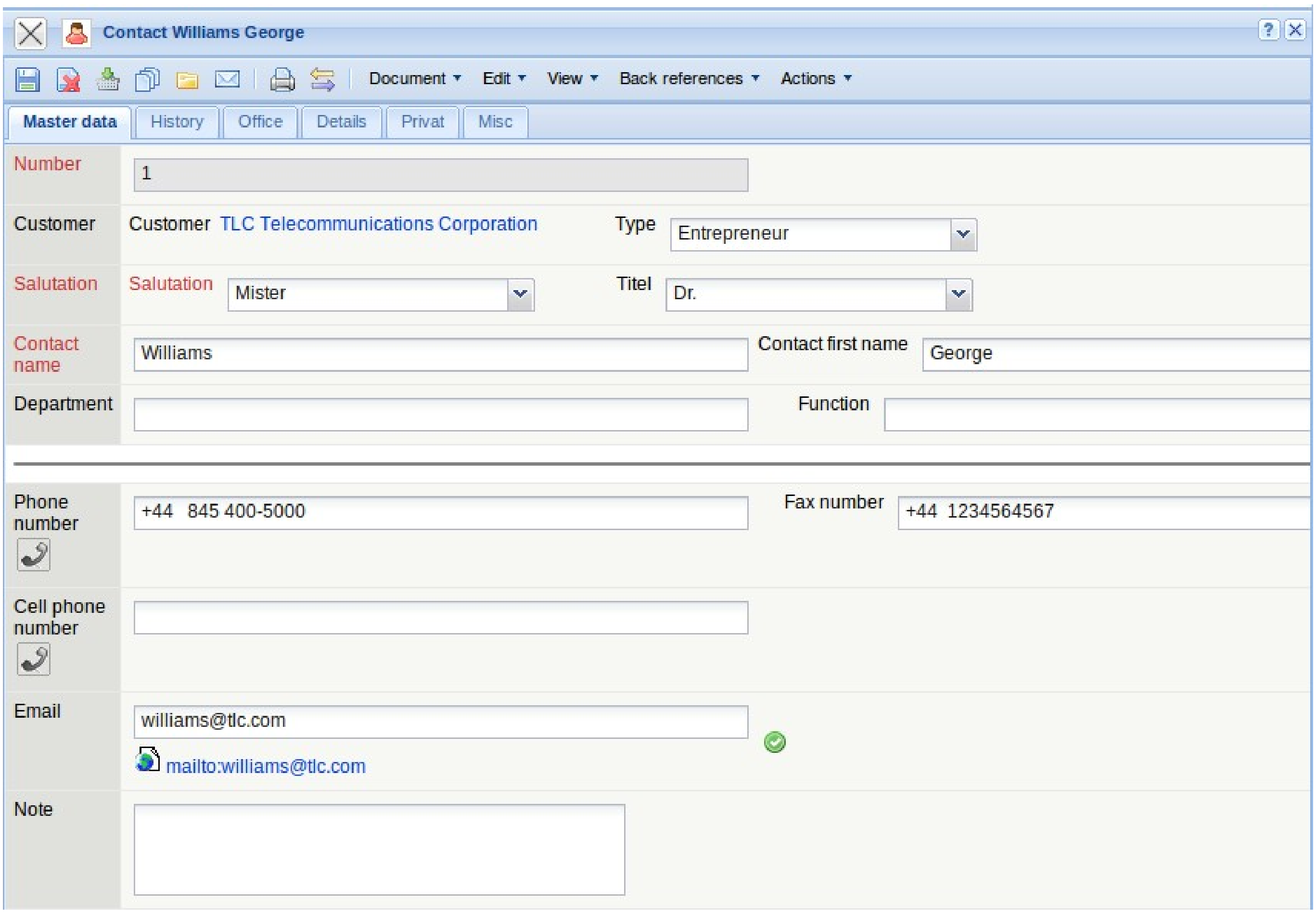
Required fields Customer: number, company name, category, currency

Characteristics:

- If the field “currency” is filled out, the customer currency overrides the standard currency from the configuration. And the customer currency can be overridden from the project currency in the document type project. For billing of the services, the system applies the project currency first and then the customer currency.
- If the field “external rate” is filled out, the external rate from the document type occupation is not used for billing purposes, but this customer rate. This rate is then applied for all occupations with this customer. The customer rate can be overridden from the project hourly rate in the document type project (see also costing).

Contact Persons

The document type contact person administers the contact persons in “customers”.



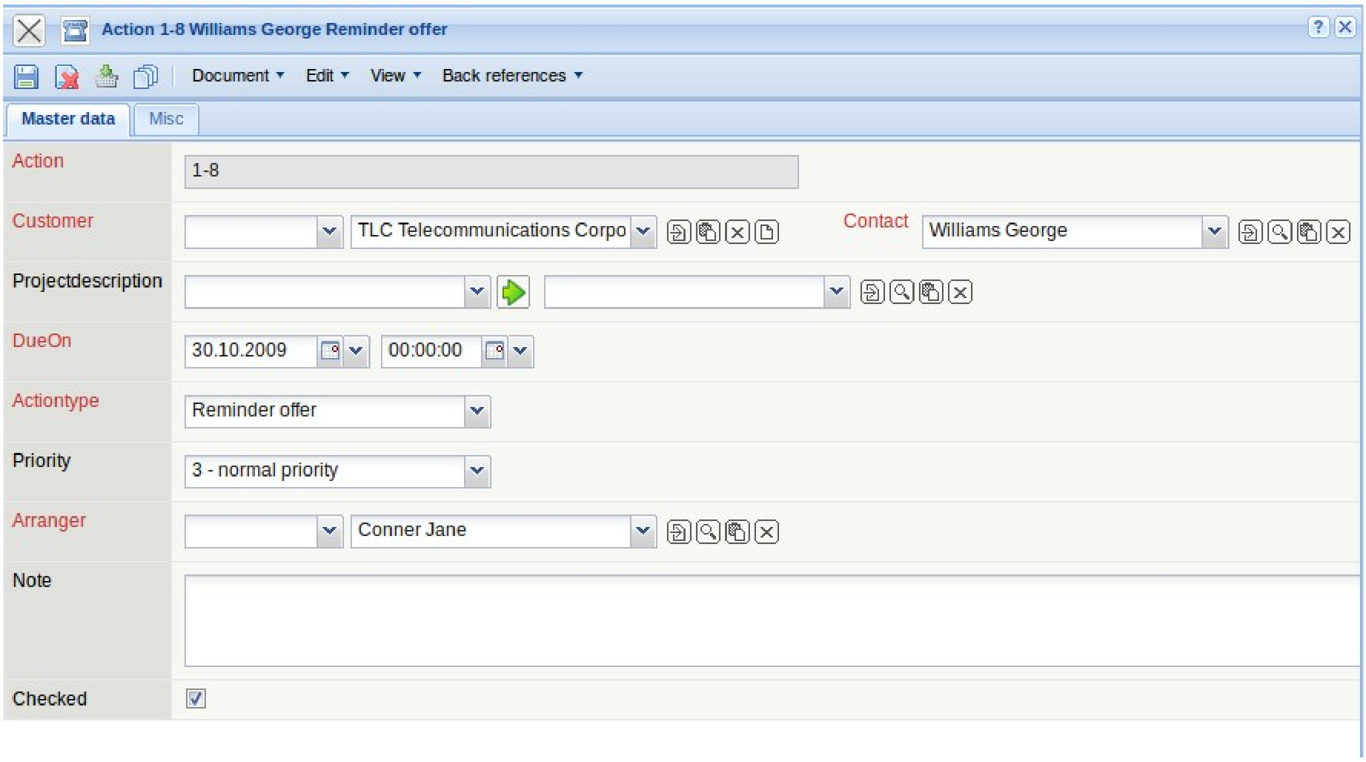
When creating a new contact person, various fields are automatically pre-populated. In the standard version of Projectile the following fields are pre-populated:

- **Number:** Pre-populated with a number automatically
- **Contact:** Pre-populated with the customer of the document
- **Telephone, Fax:** Pre-populated with the values of the customer
- **Address data:** Pre-populated with the values of the customer

Required fields of the customer: Number, Salutation, Name

Actions

The document type "action" administers the actions of the contact person of a company. The contact persons can be assigned to user-defined actions, e.g. call. mailing, presentation, public relations.



When creating a new contact data record, various fields are automatically pre-populated. In the standard version of Projectile the following fields are pre-populated:

- **Action:** Pre-populated with a number automatically
- **Date:** Pre-populated with the current date
- **Priority:** Pre-populated with "3 - normal priority"
- **Arranger:** Pre-populated with the logged on employee
- **Definition date:** Pre-populated with the current date

Required fields: Action, Date, Action type, Employee, Definition Date

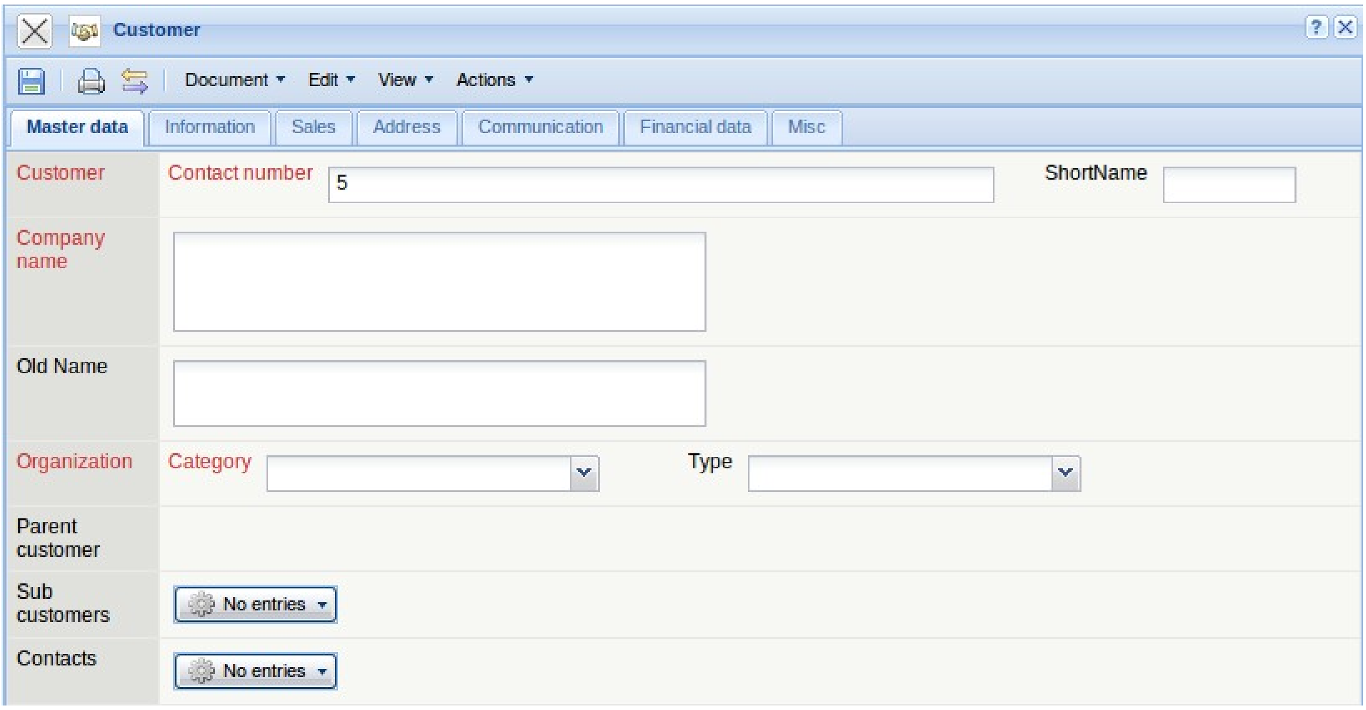
Characteristics:

- In the check box "checked", the processing status is defined. Tasks, which are only entered but not yet processed are (e.g. advance), given the status not completed.

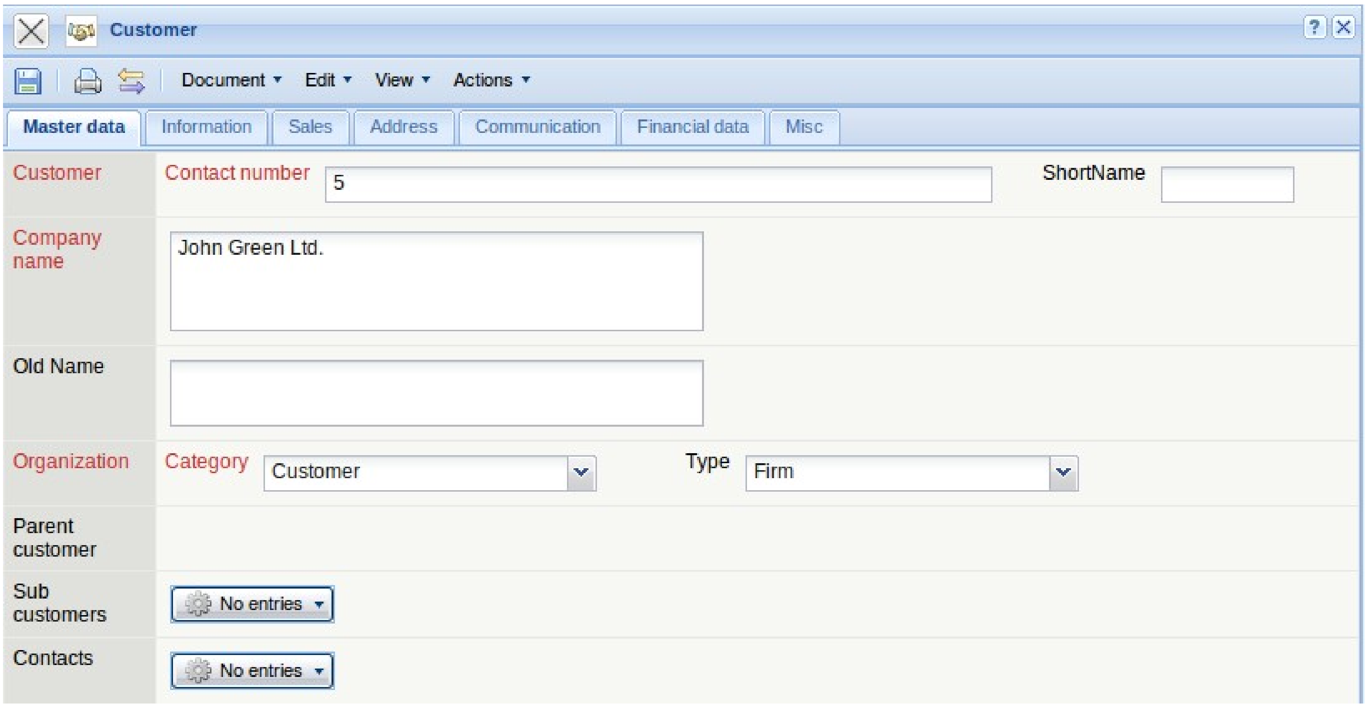
Example Customer Administration

In the following example, a new customer with various contact persons and some actions are created. First, a new customer is created using the action "create".

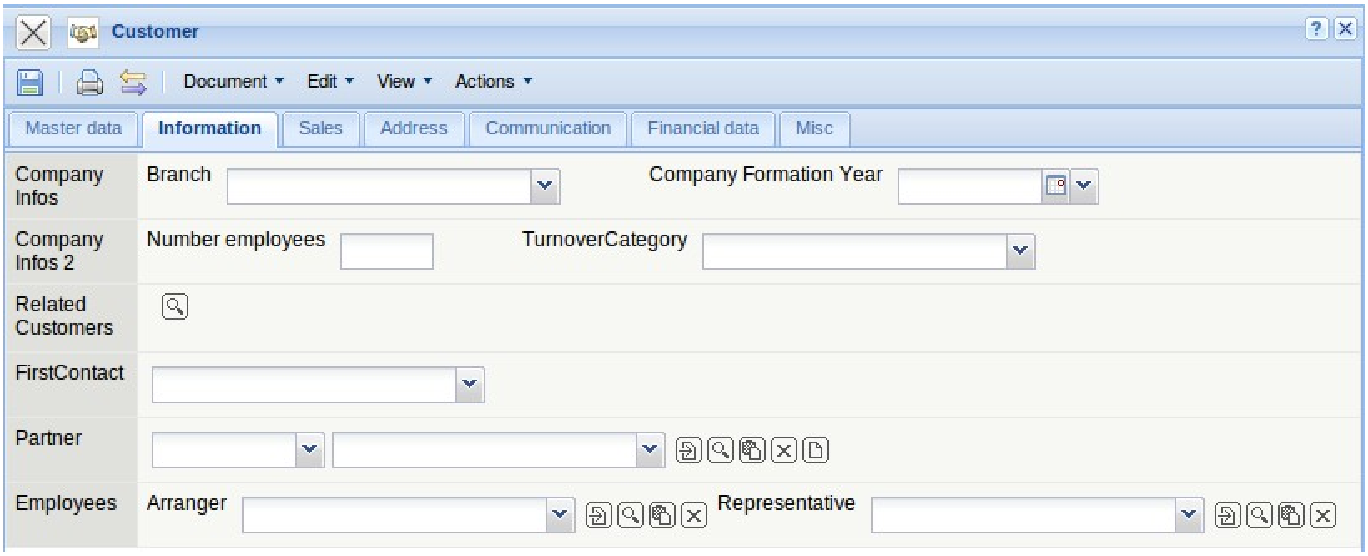
A new document type "customer" is opened with the above described pre-populated fields.



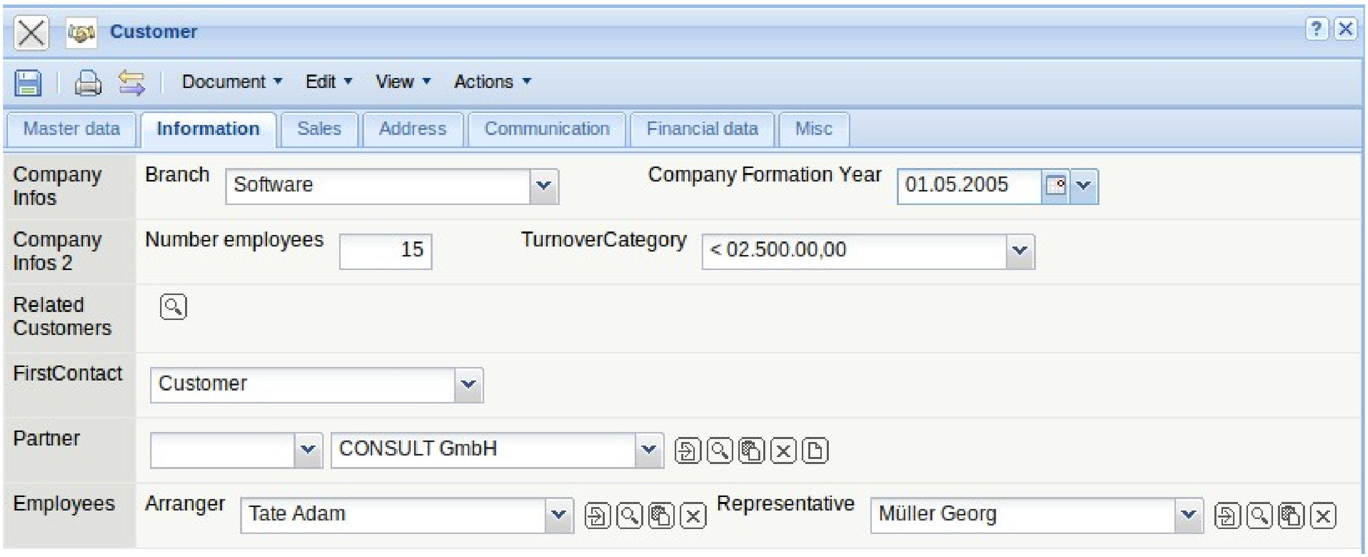
Finally, the relevant fields of the first tab are filled, e.g. the company name, the short name and the category. The category is not only an information field, but also has functional character. If the category "customer" is selected, this contact is the client for the projects or bill recipient for the contracts. If the category 'supplier' is selected, then this contact is the supplier of third-party services and foreign invoices. After defining the fields of the tab "master data", the document is saved.



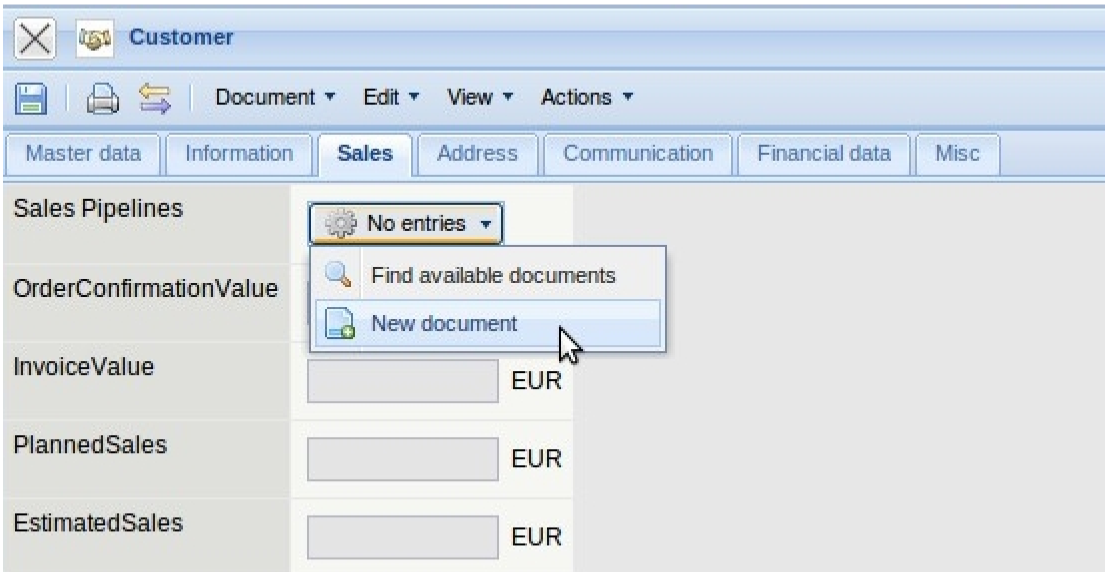
Then change to the “information” tab. Various classifications for the customer, e.g. sales relevant information, can be stored here.



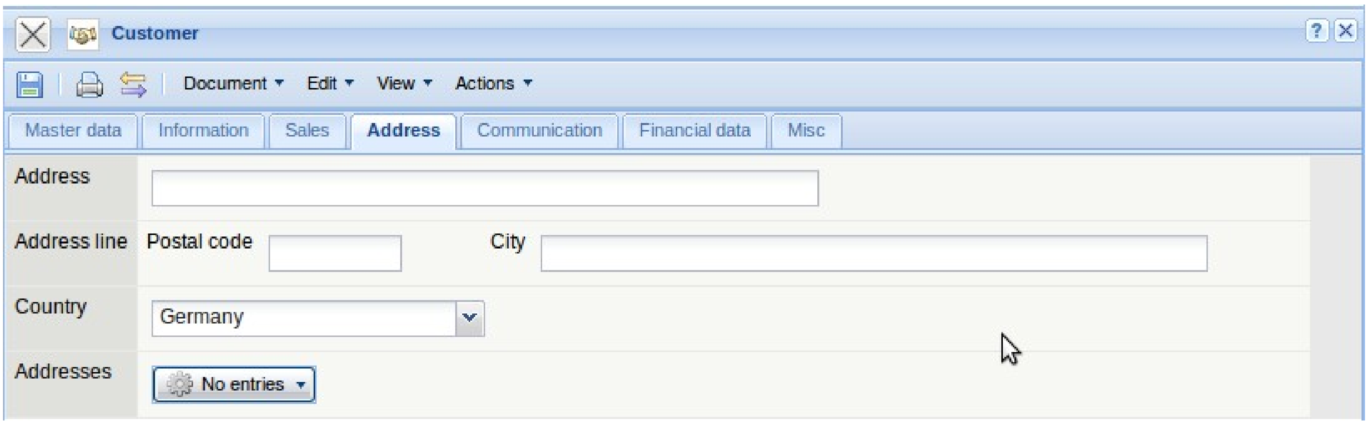
The branch, company formation year, number of employees, turnover and further information as the type of first contact, partner and employee can be entered here.



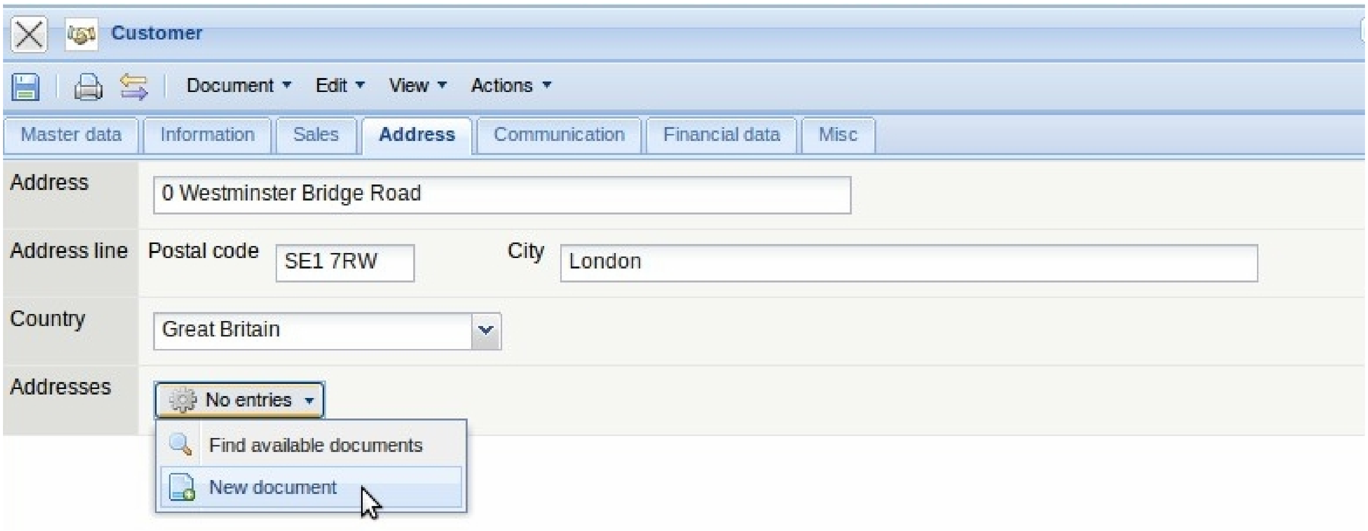
On th “Sales” tab sales pipelines can be entered and order confirmation value, invoice value, planned sales and estimated sales are displayed.



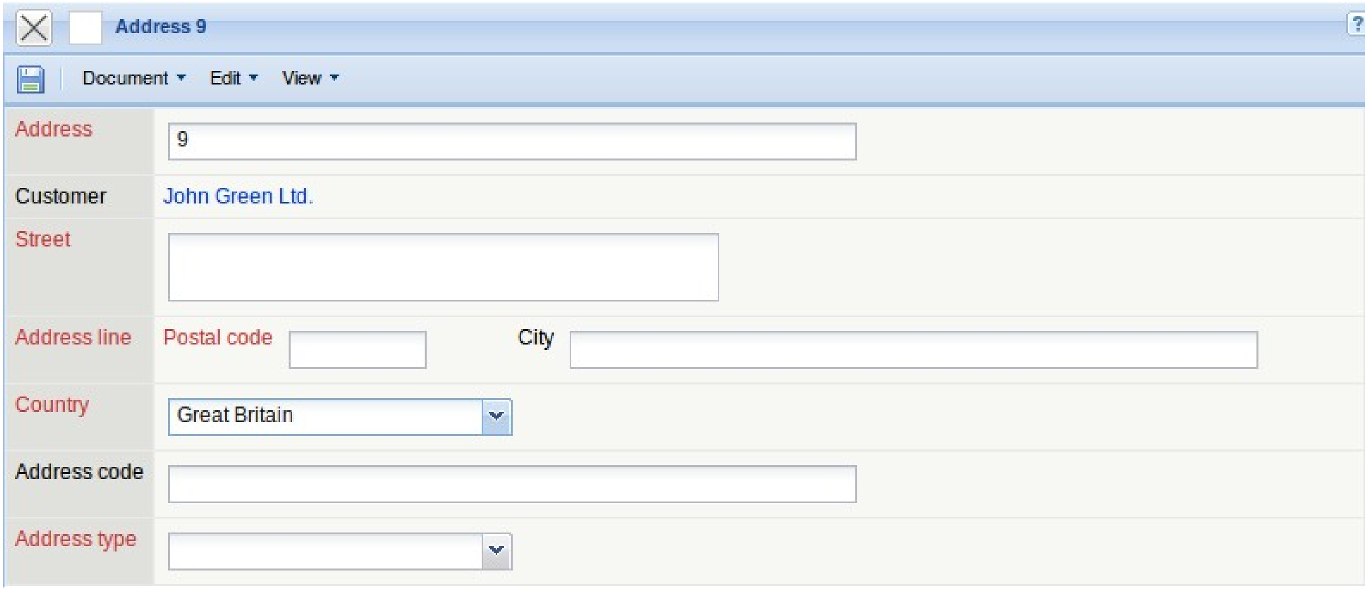
Then change to the next tab is “Address”.



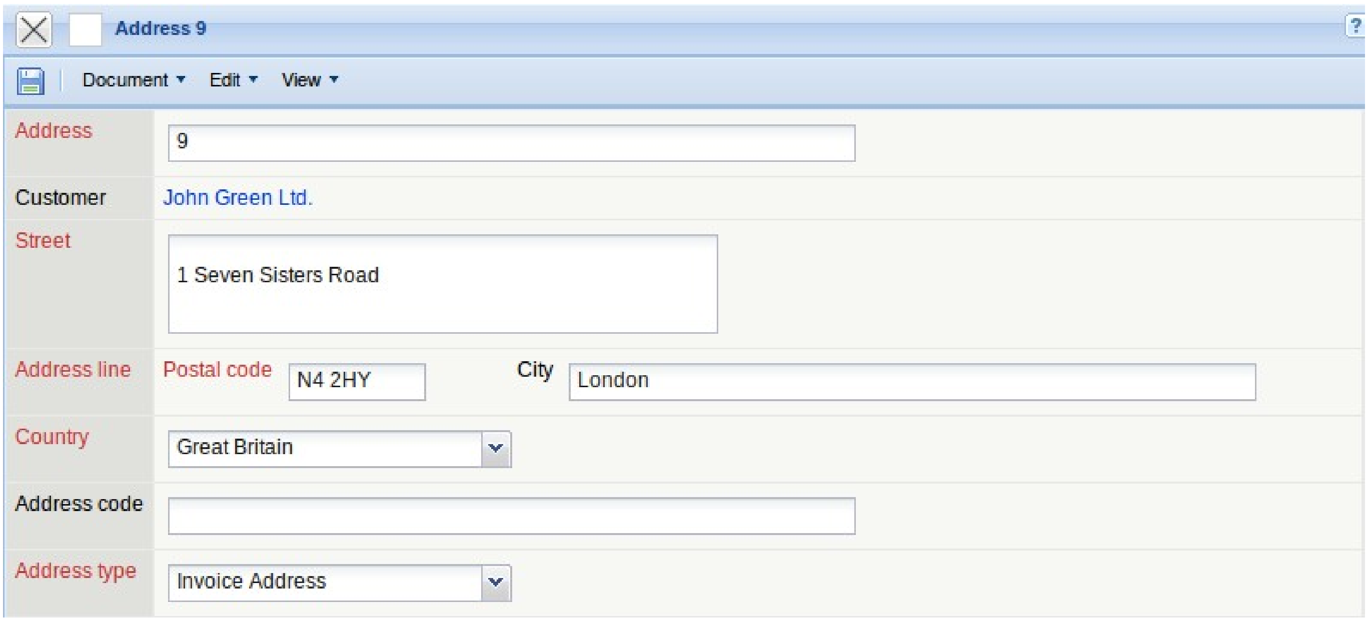
The company address of the contact is entered here and further address can be created using the functionality “new document”, if necessary.



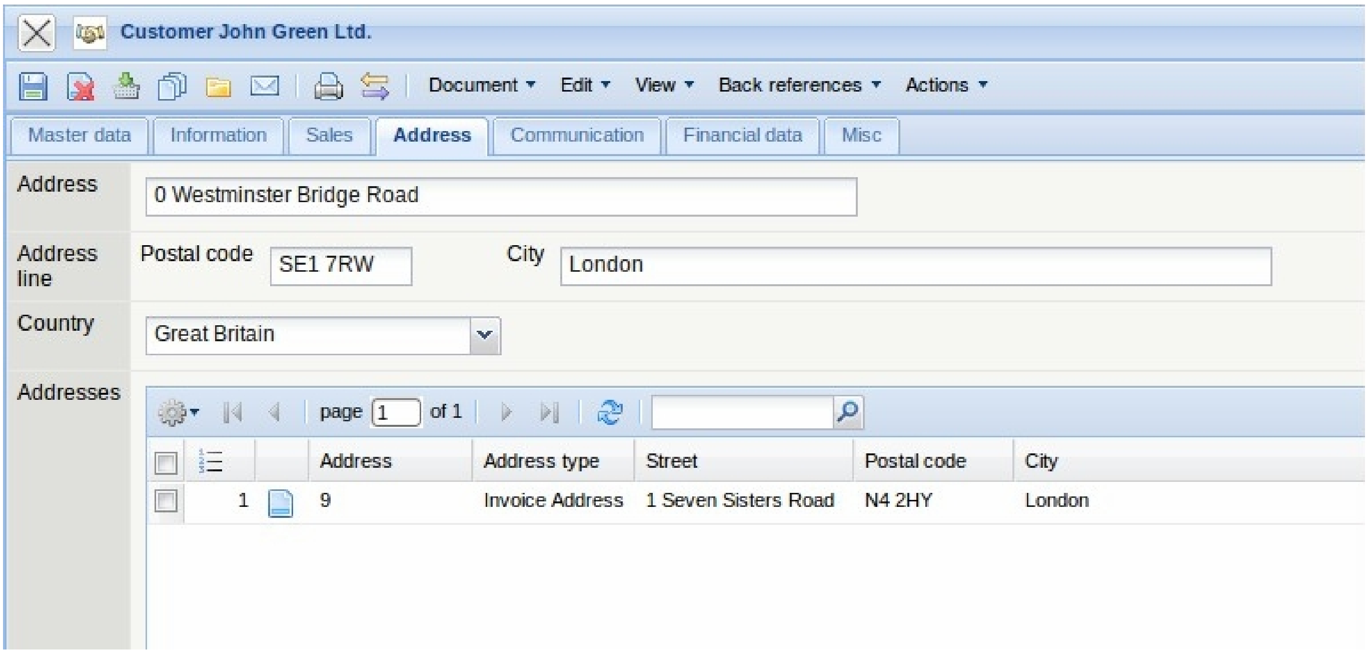
Further (differing) addresses for the customer can be …



… defined here (here, a differing billing address).

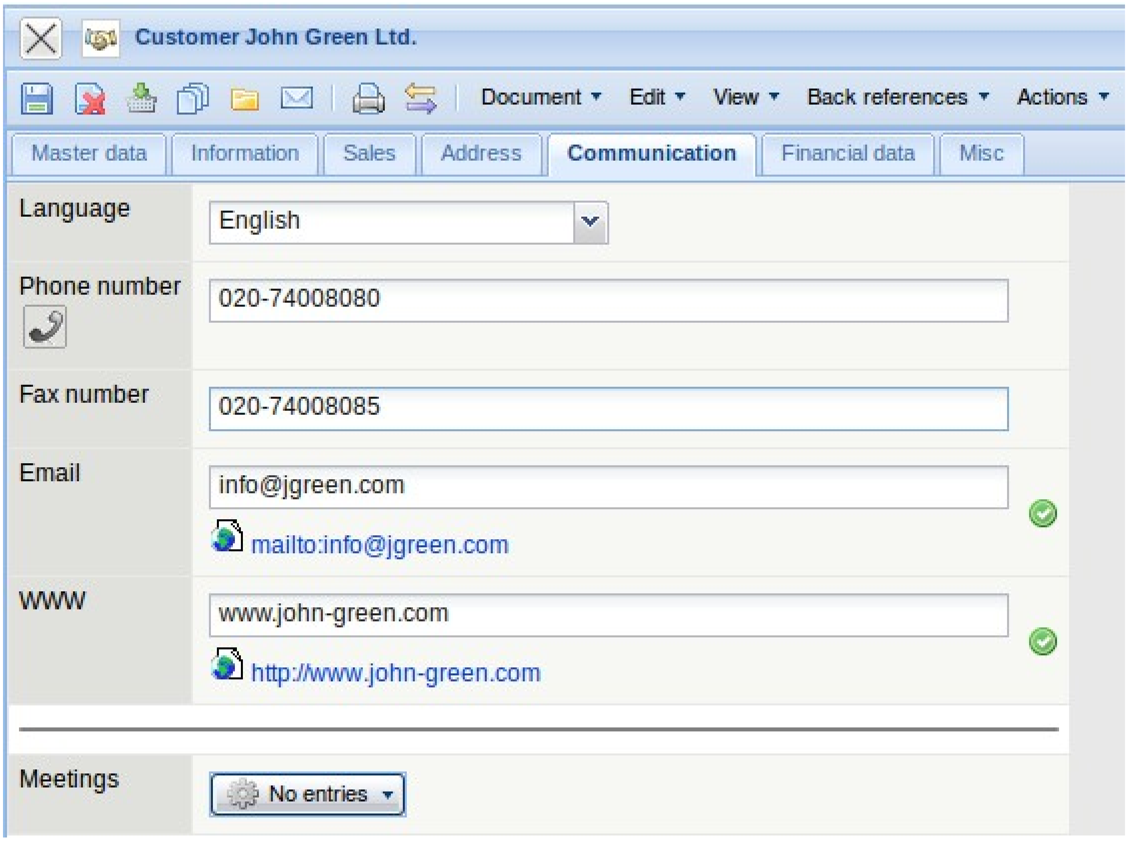


After saving the document …



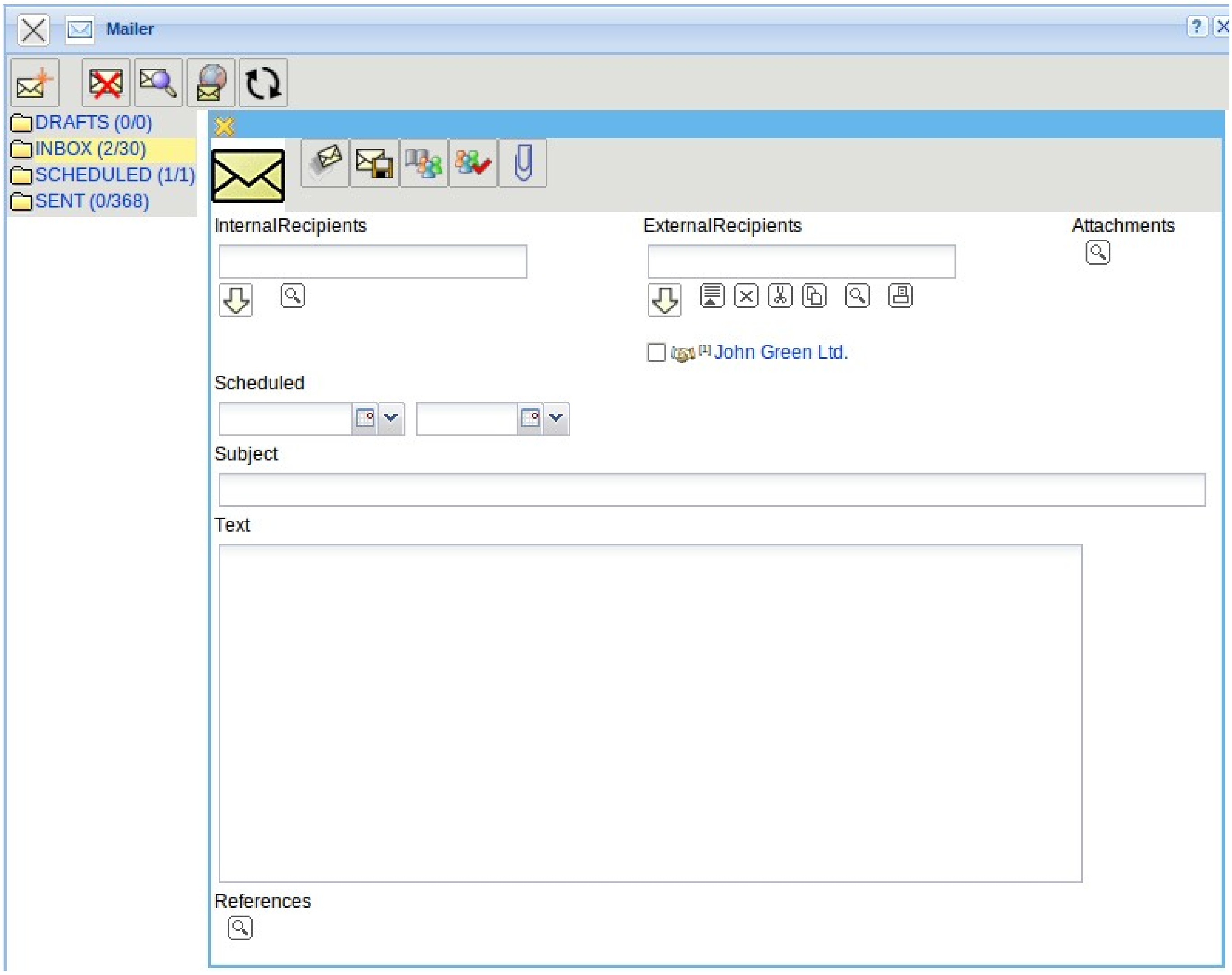
… the communication data can be entered in the “communication” tab.

On the “communication” tab, the contact's language, telephone number, fax, e-mail and website address can be entered.



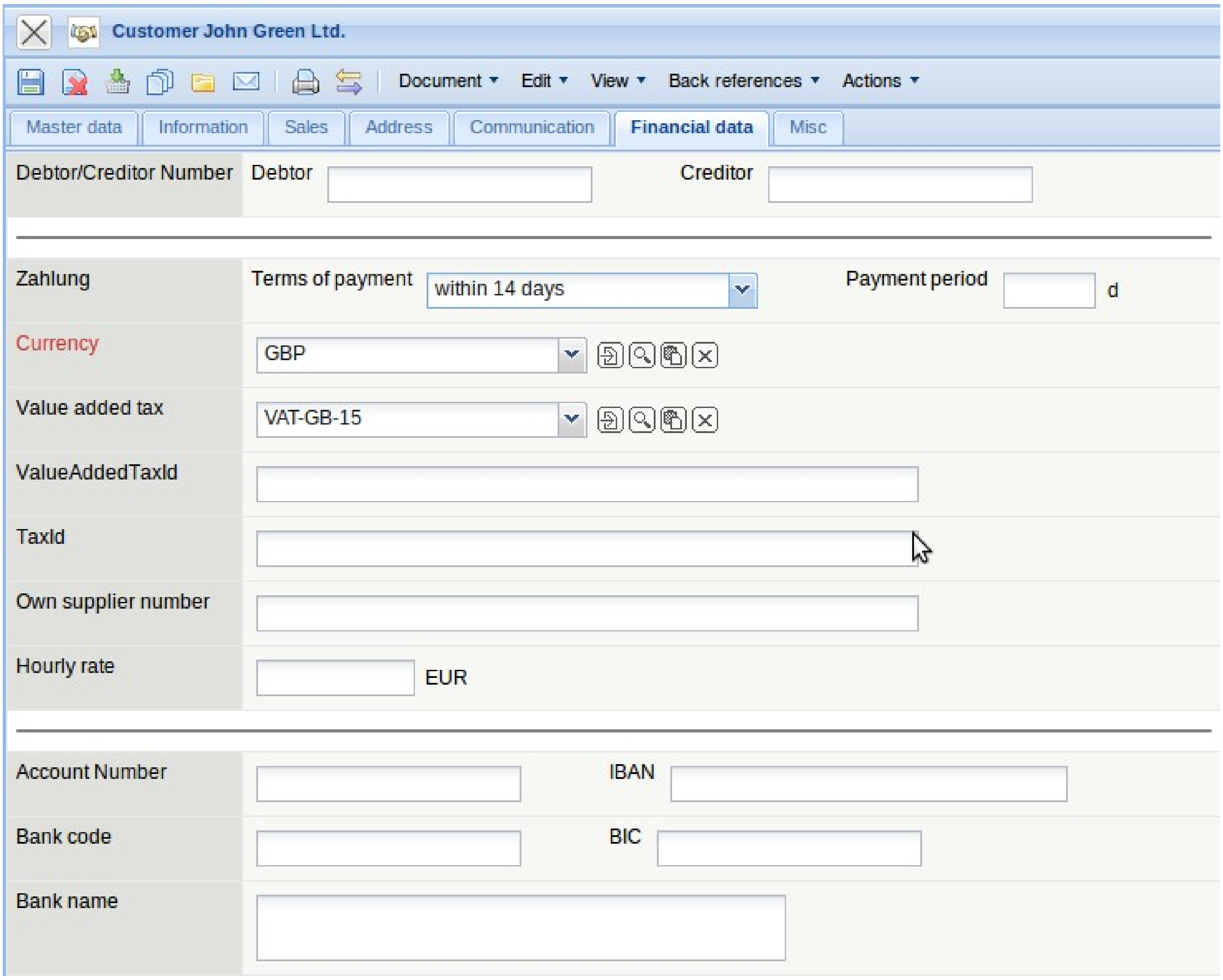
After saving the document, the e-mail address and the website address are included by the system. The link to the e-mail address opens the standard e-mail client of the user. The link of the field “www” opens the website of the contact in the standard browser of the user.

If the optional mail system mailer is used, the appropriate e-mail address …

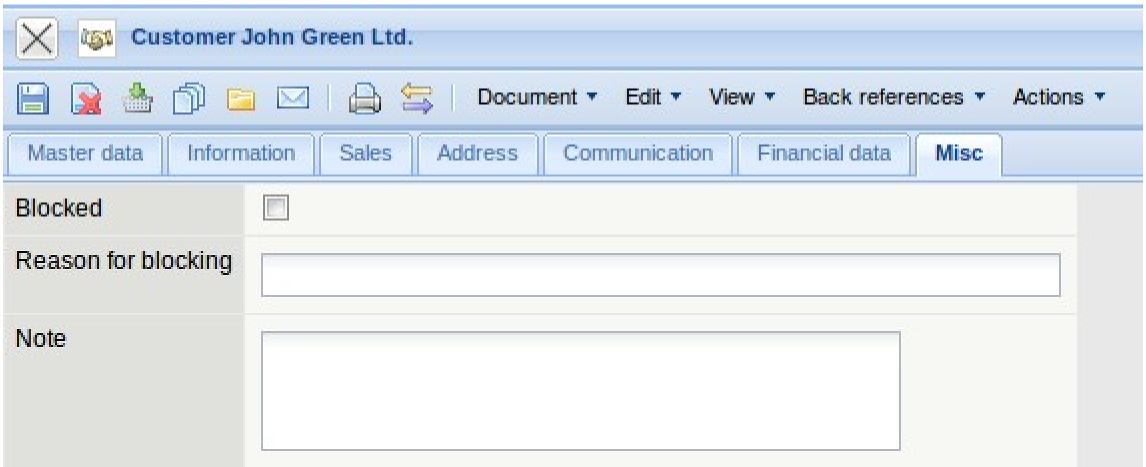


… can be opened through the function bar.

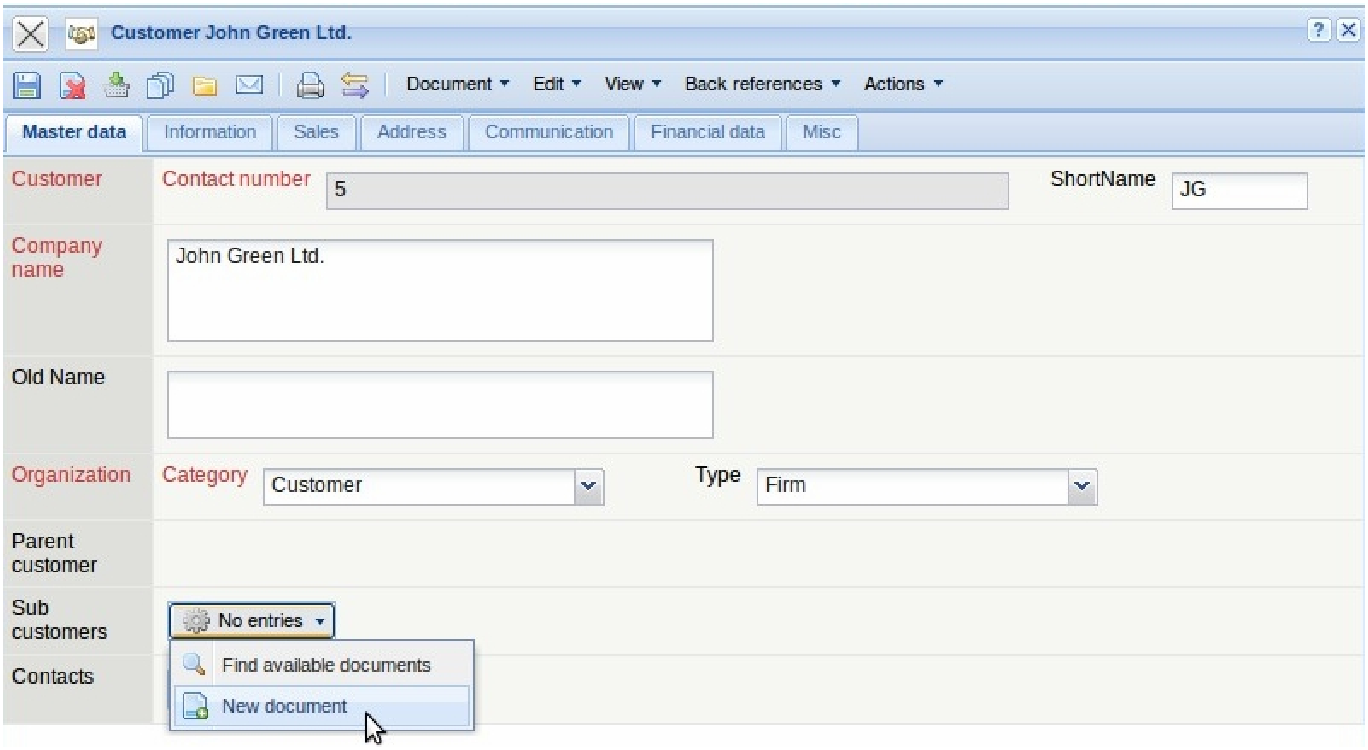
On the “Financial data” tab, the pre-settings of the customer for the the invoicing module can be stored …



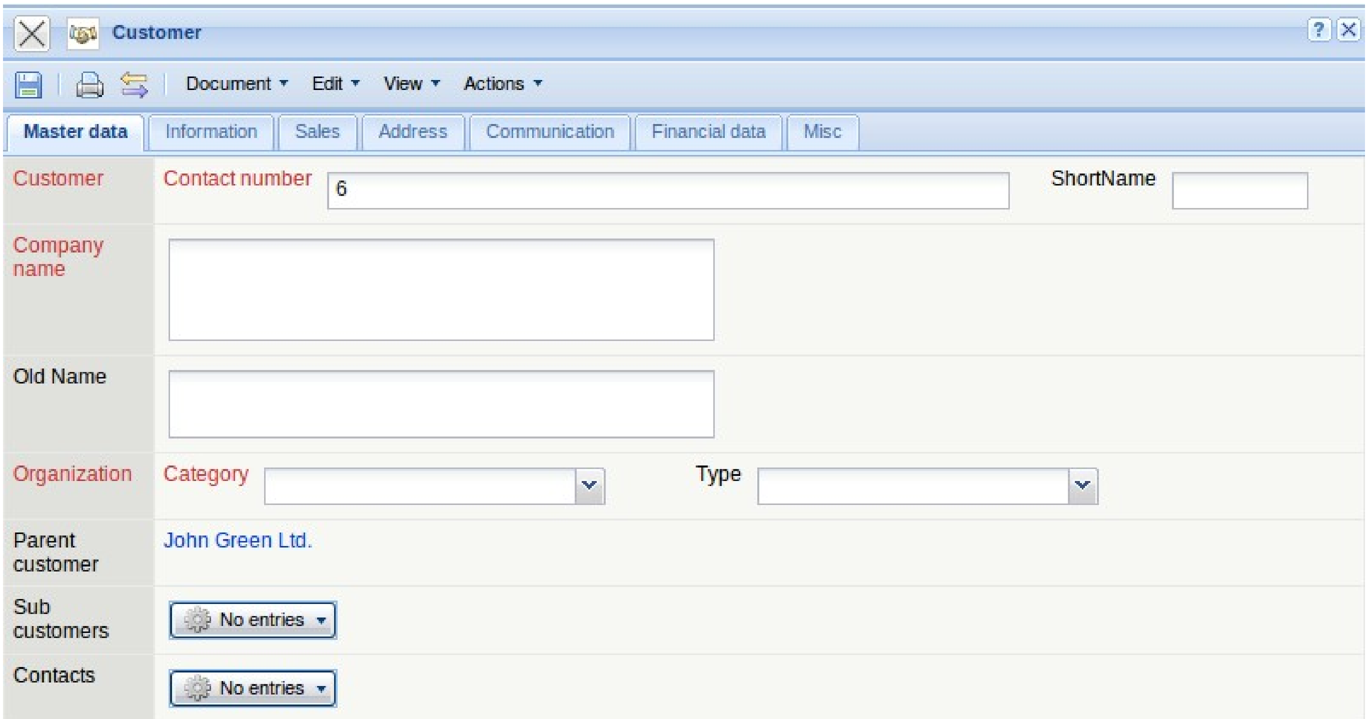
… and on the “Misc” tab blocking criteria and comments can be entered.



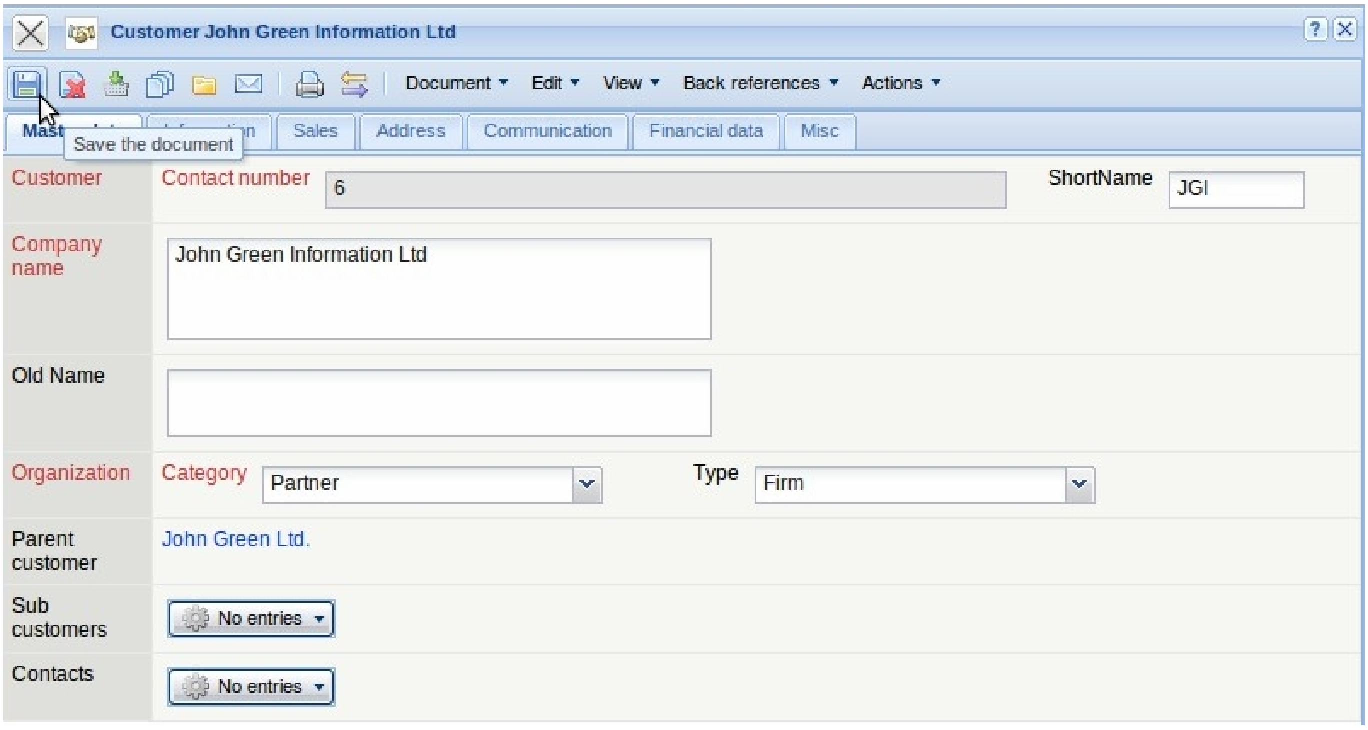
Customers can be further subdivided. In the following example, the company John Green Ltd. has two subsidiaries. Using the functionality “New document” in the field sub-customers …



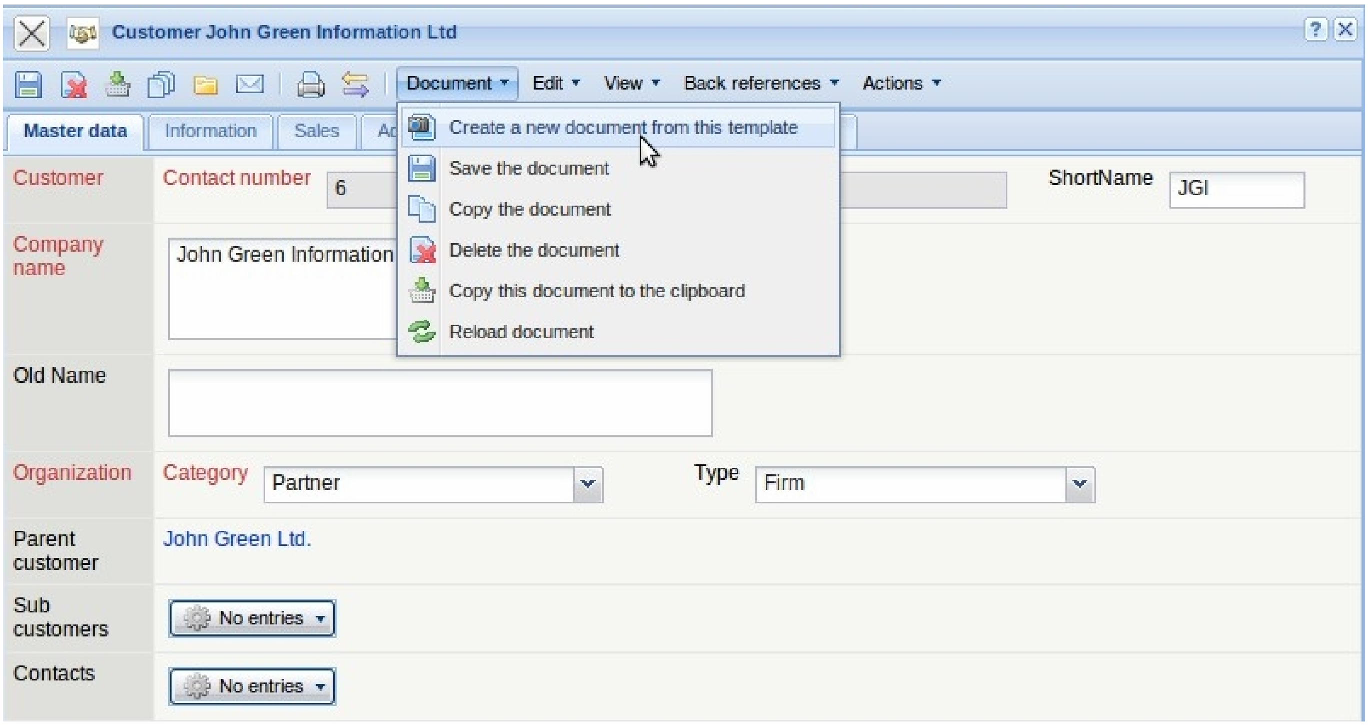
a subsidiary or a branch can be entered.



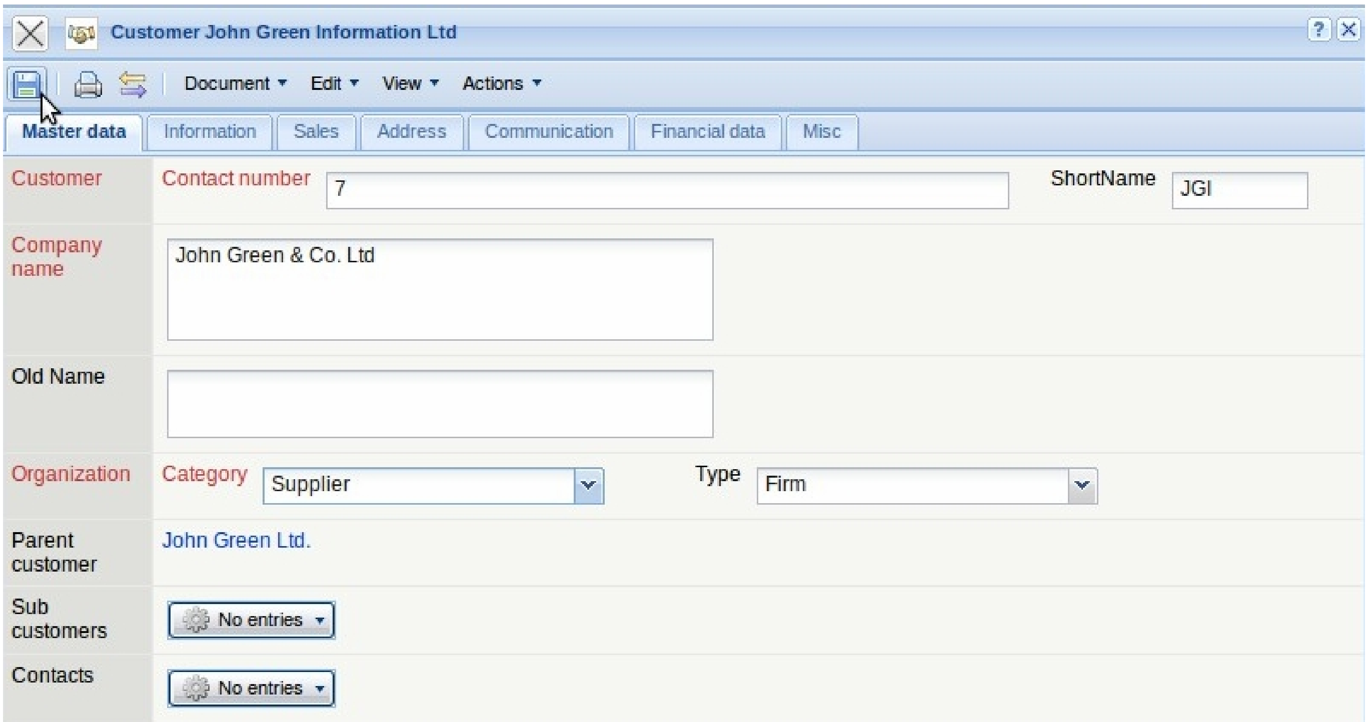
After creating the first sub-customer, using the function …



… "Create new document from this template" a second customer can be created.

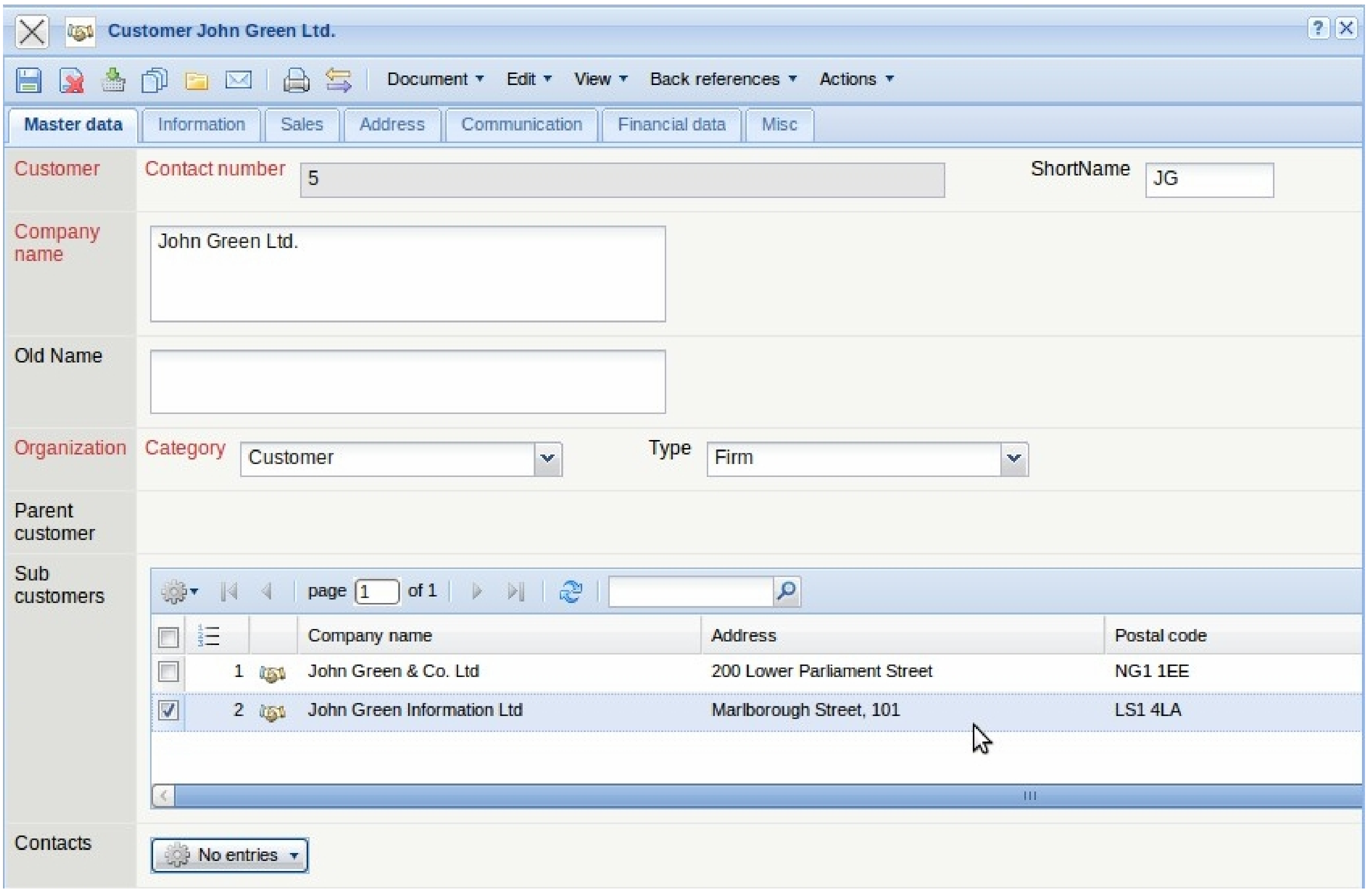


After saving the document …

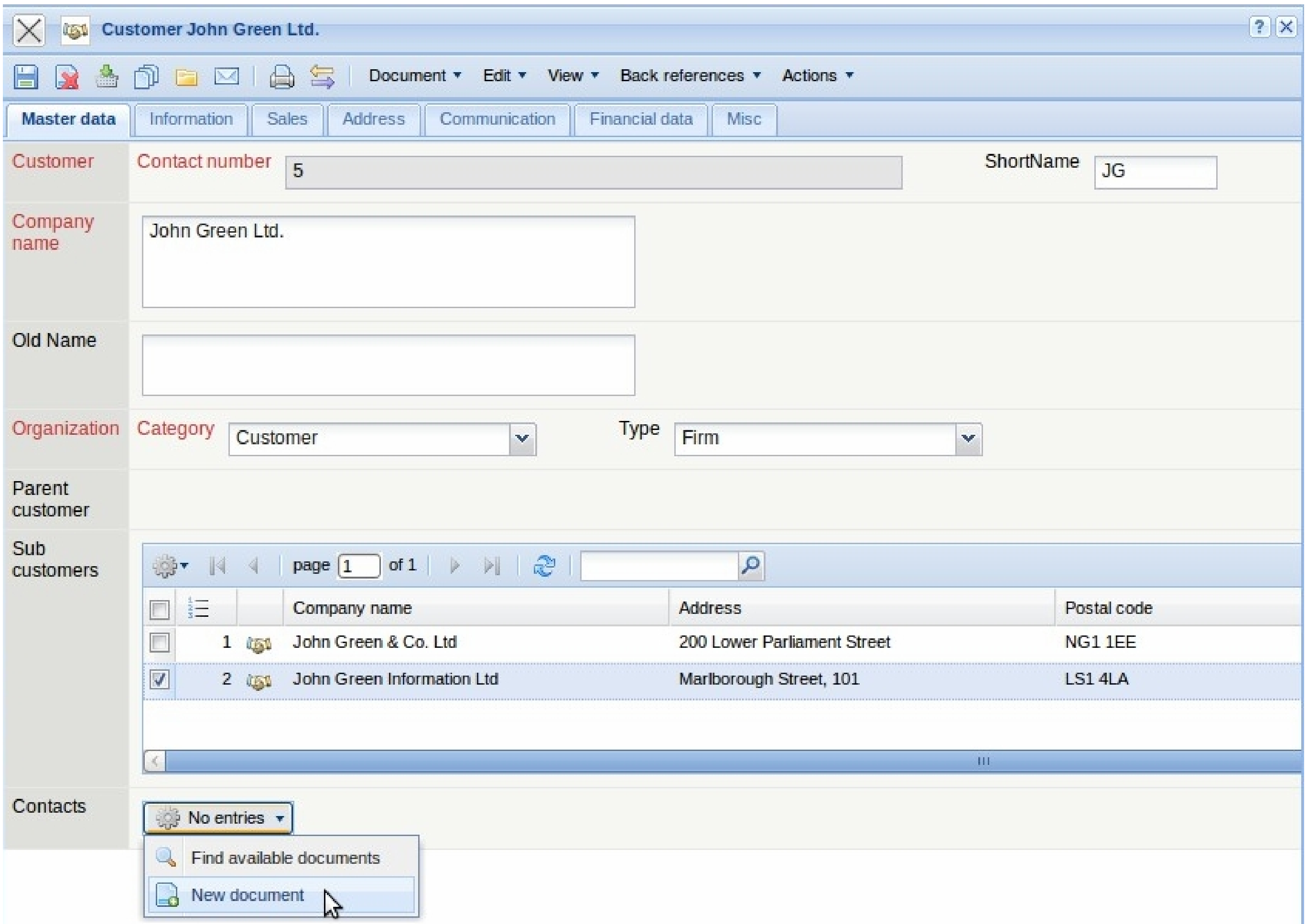


… the forms of the sub-customers are closed.

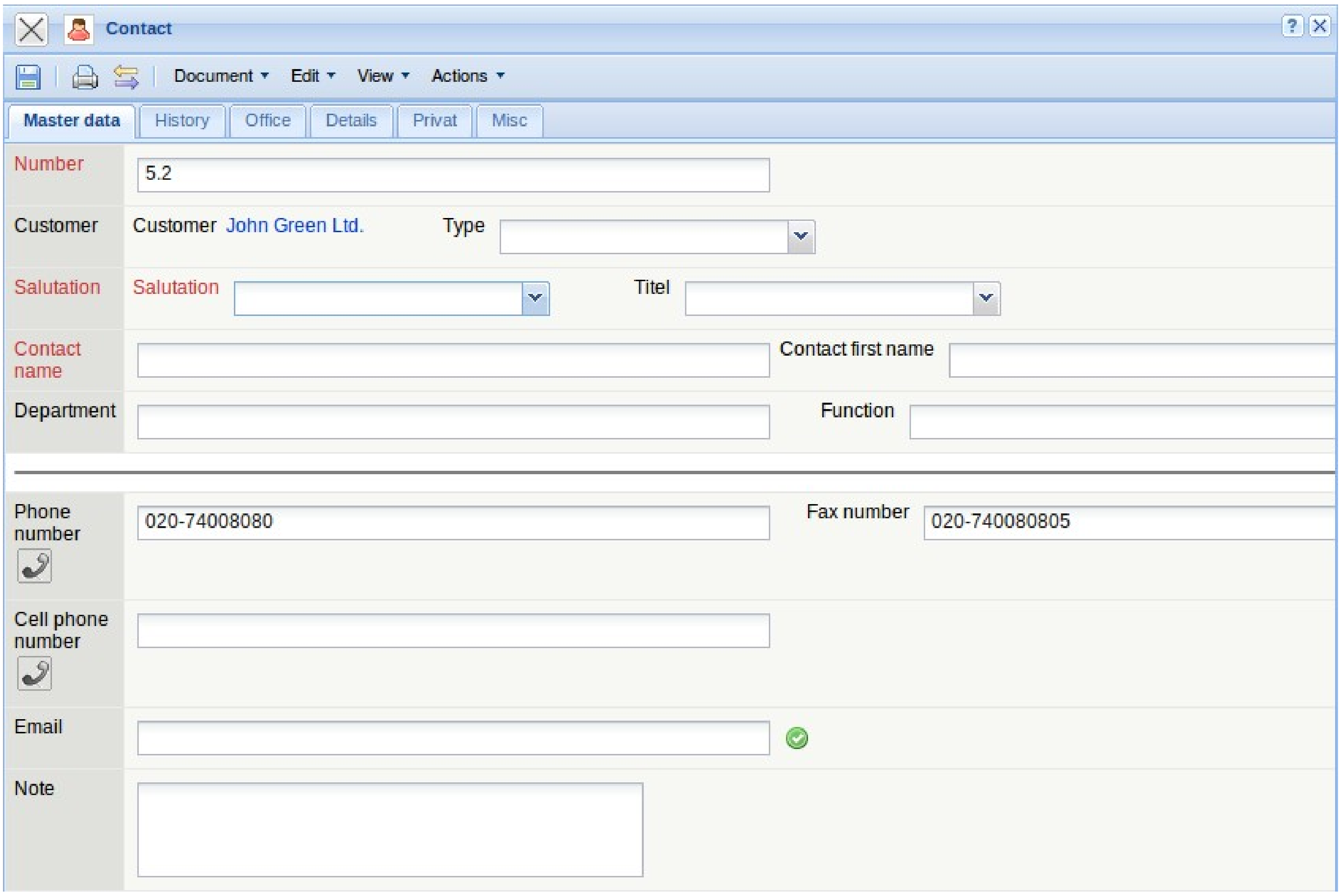
Then, the sub-customers are available in the “customer” form.



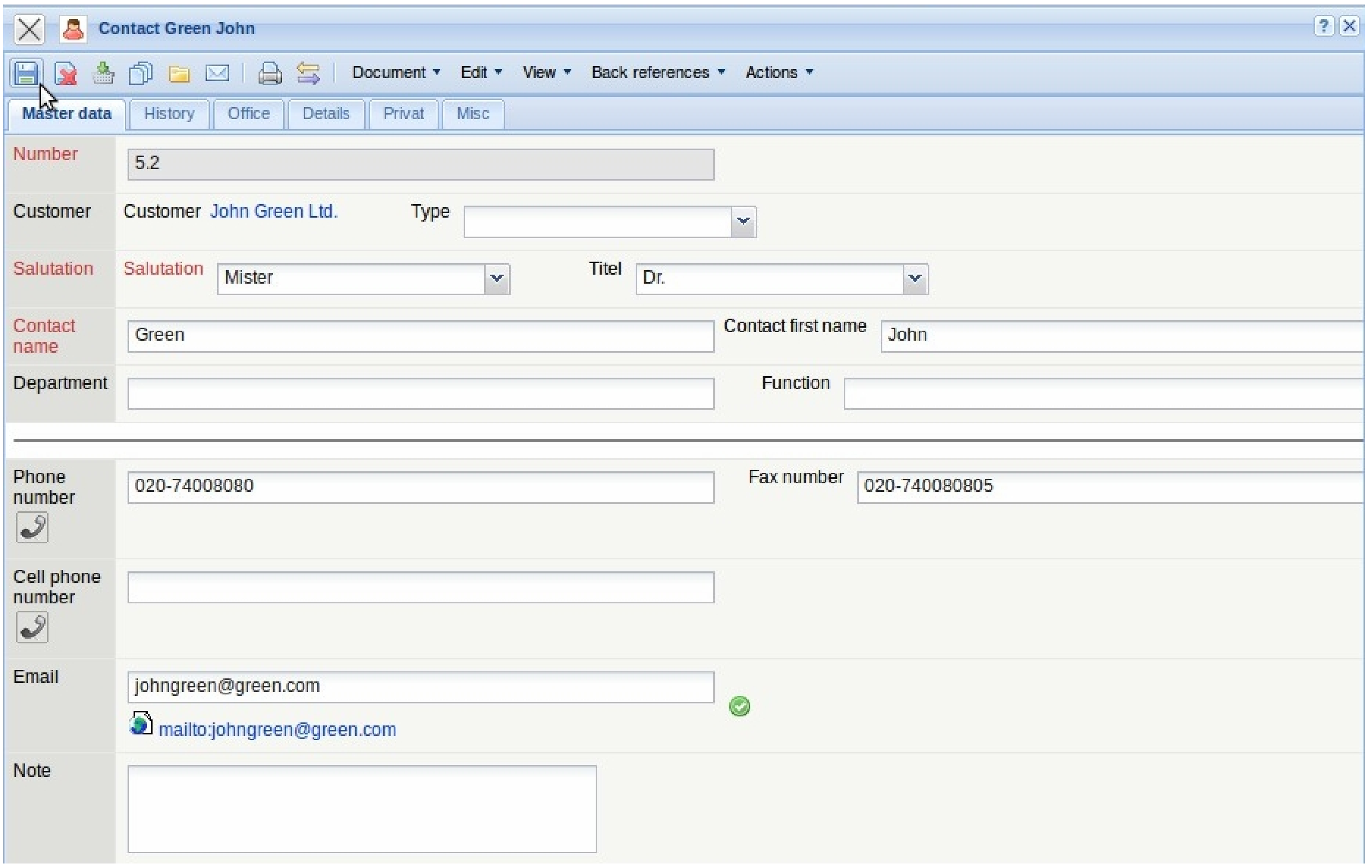
Next, a contact person for the customer is created. First, the function “New document” is activated in the element Contacts:



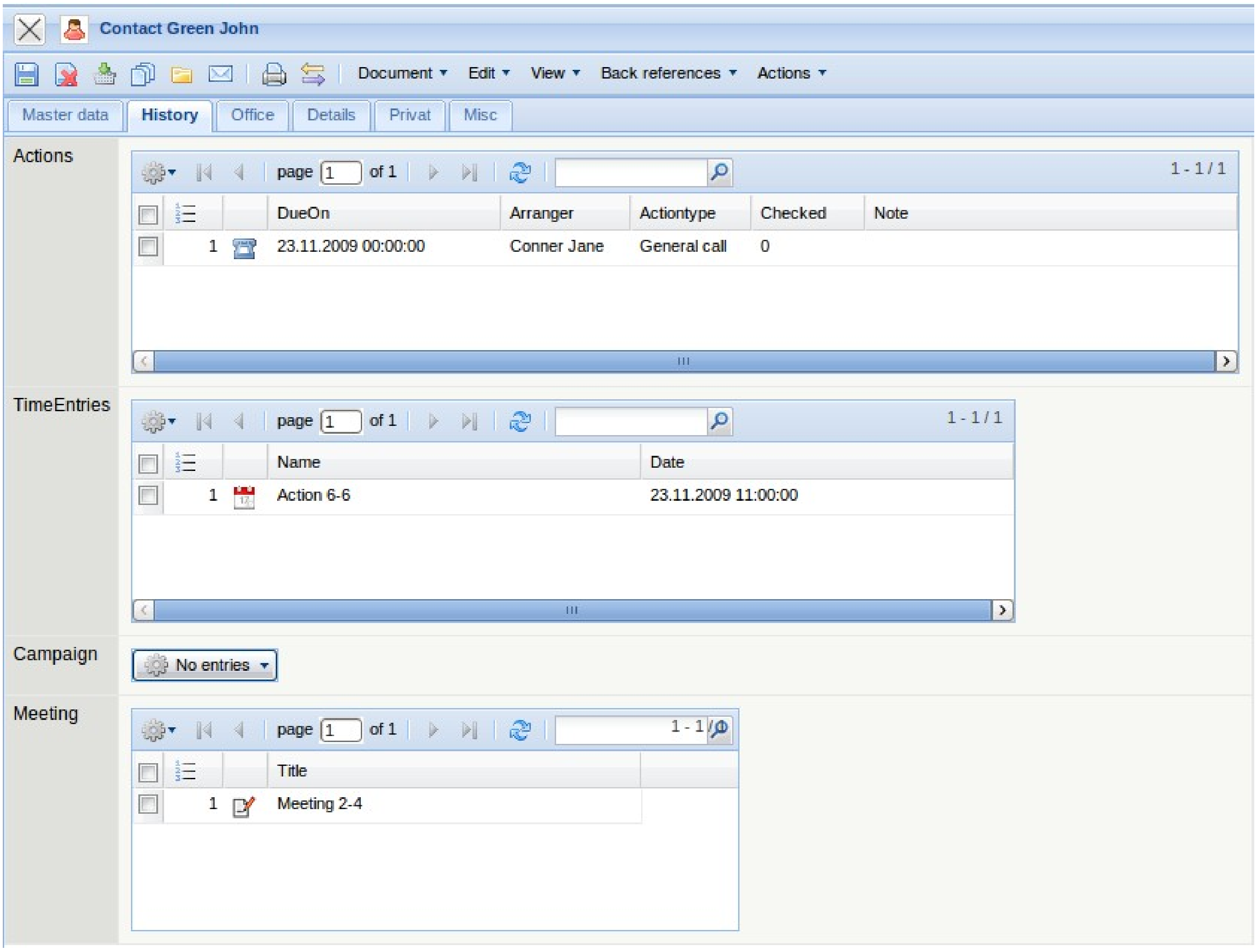
The system generates a new document of the type “contact person” and pre-populates the customer (and various information from customer) automatically.



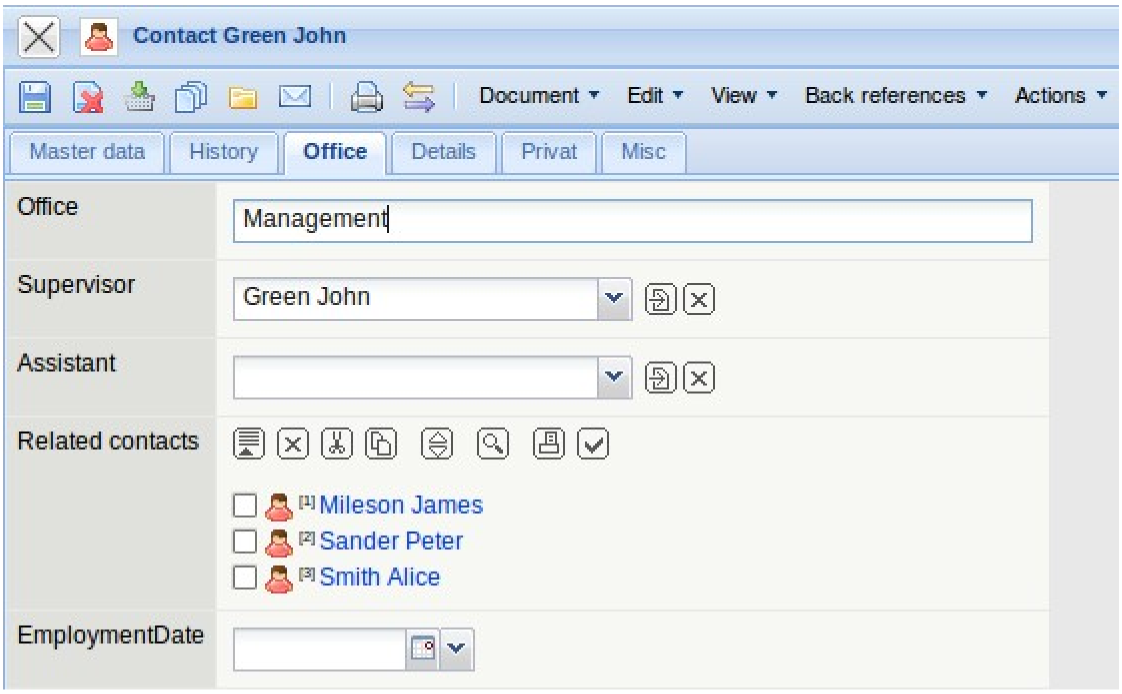
After filling out the relevant fields, the document is saved.



On the “History” tab, the actions, time entries, campaigns and meetings can be entered.

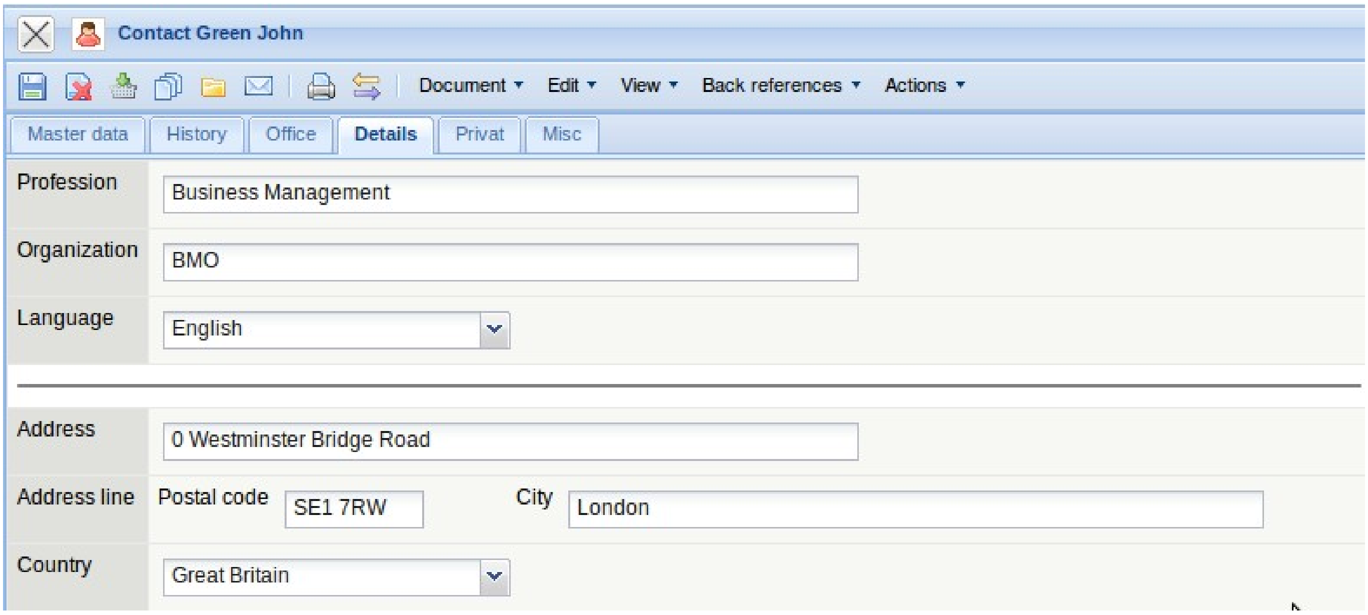


On the "office" tab, the office, supervisor, assistant, related contacts and employment date can be entered.

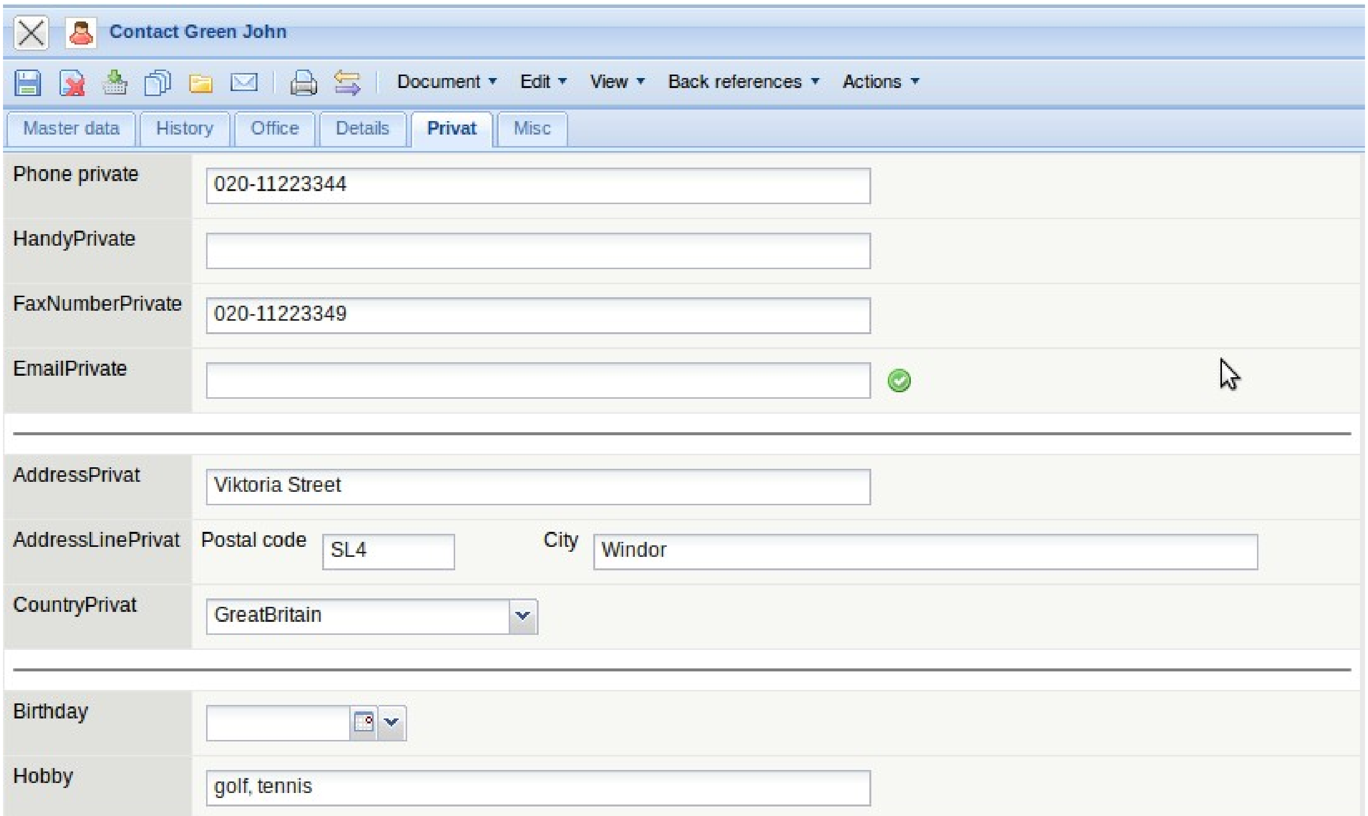


On the "Details" tab, the profession, organization, language and address of the contact can be entered.

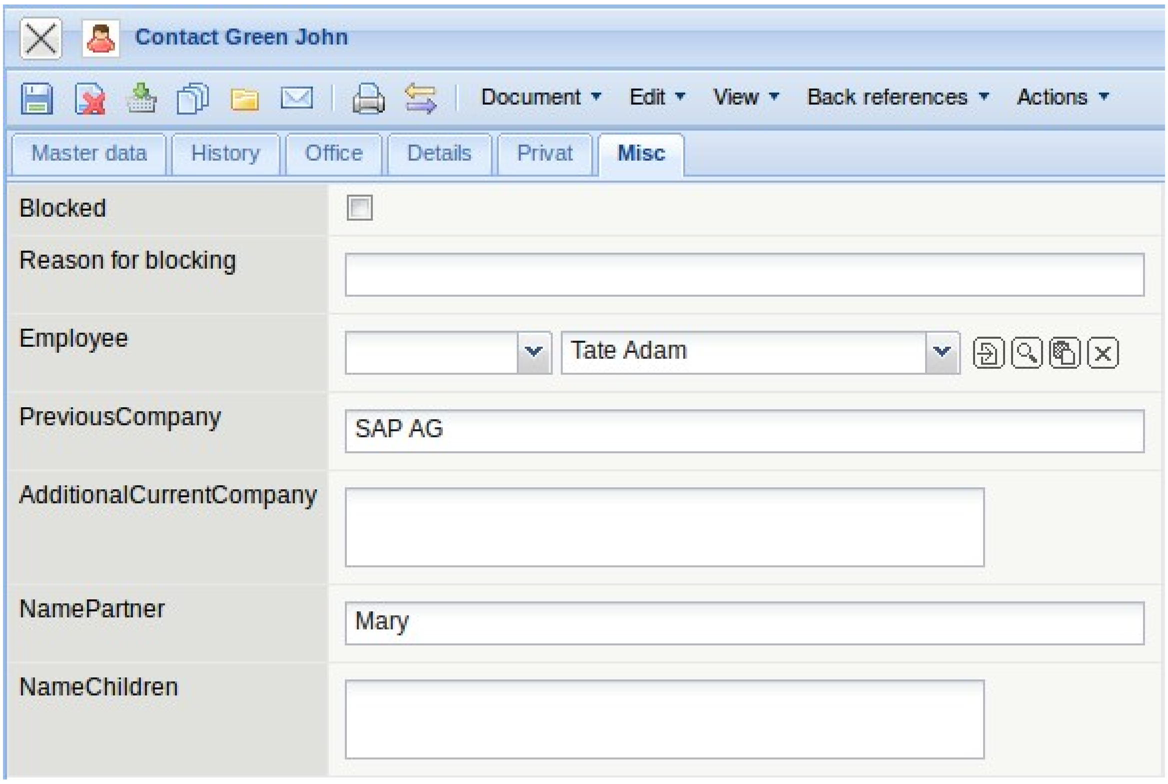
Auf dem Reiter “Details” werden die Kampagnen aufgelistet und können Beruf, Organisation, Sprachfähigkeiten, Tätigkeiten und Adressdaten eingegeben werden.



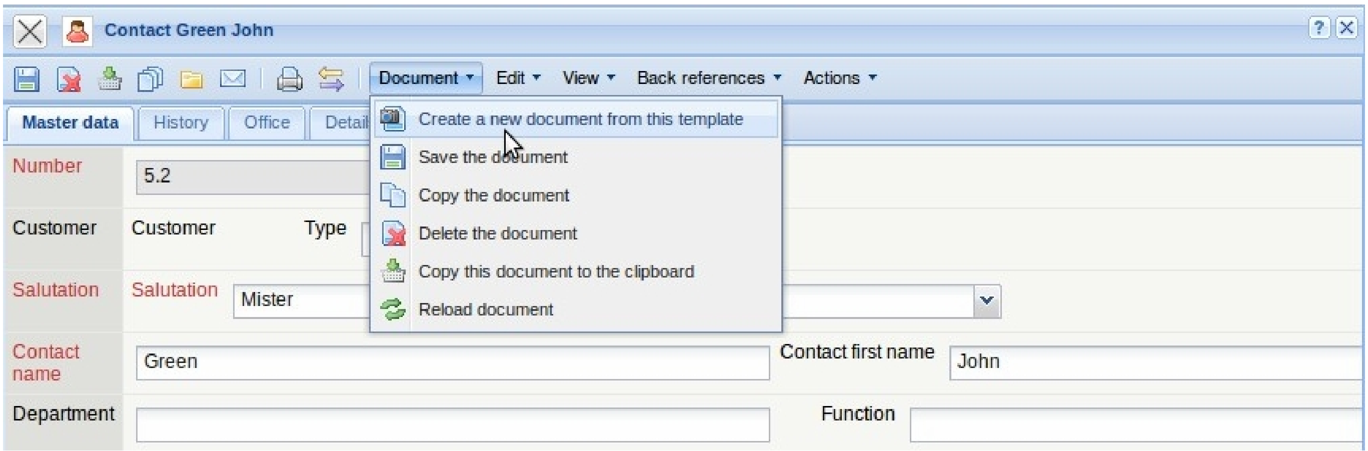
On the “Private” tab, the private telephone number, mobile number, fax and e-mail and other private information can be entered.



On the “Misc” tab, the blocking criteria, employee, company and further information can be entered.

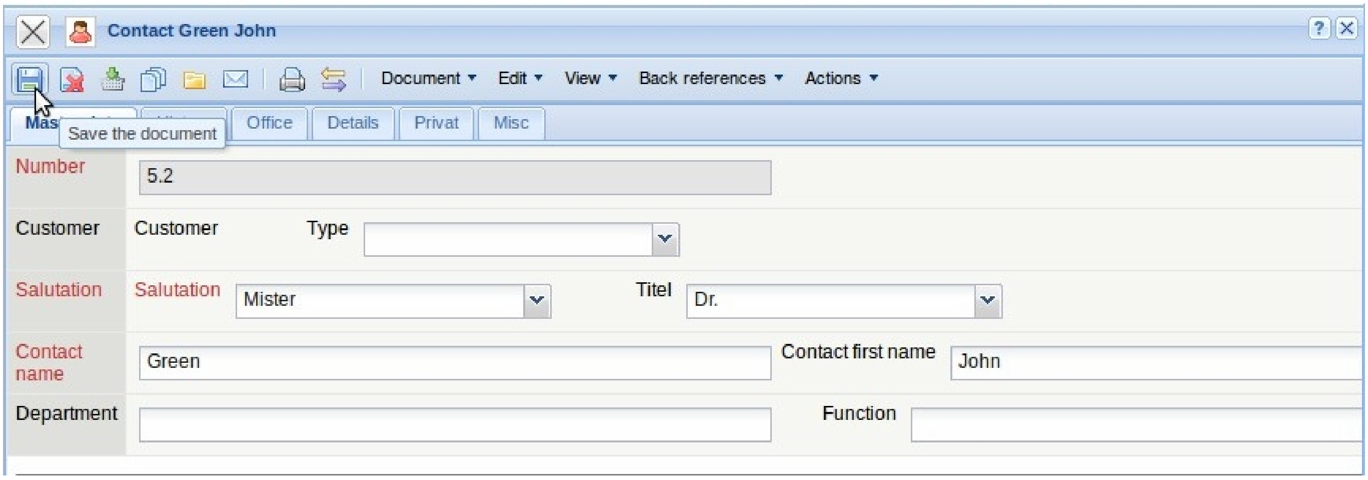


A further contact person can be generated using the functionality “Create new document from this template”.

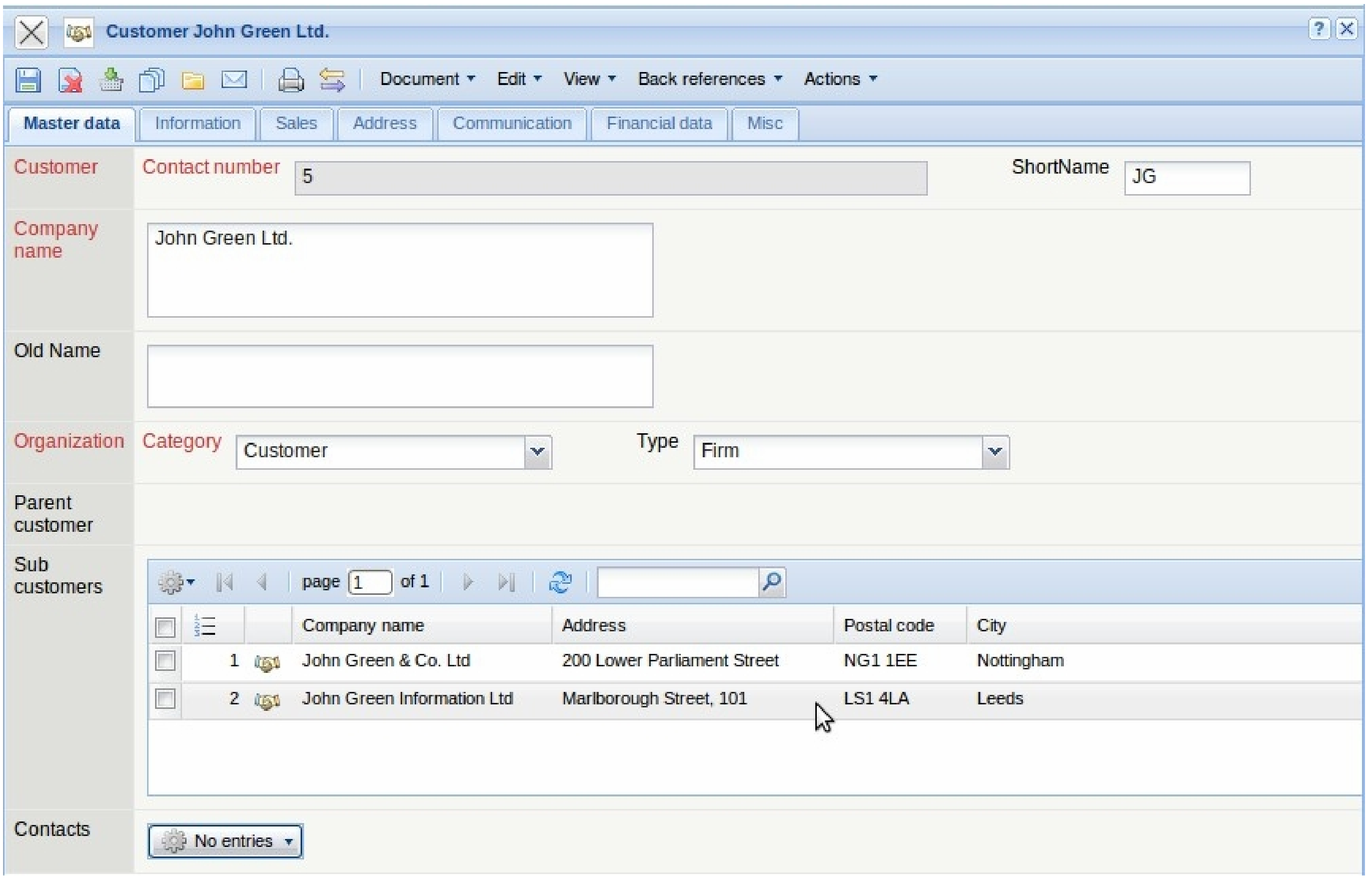


Herewith, the contact person is copied and the user is then able to modify the data.

After saving the document …



… the contact person is then directly available in the document.



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