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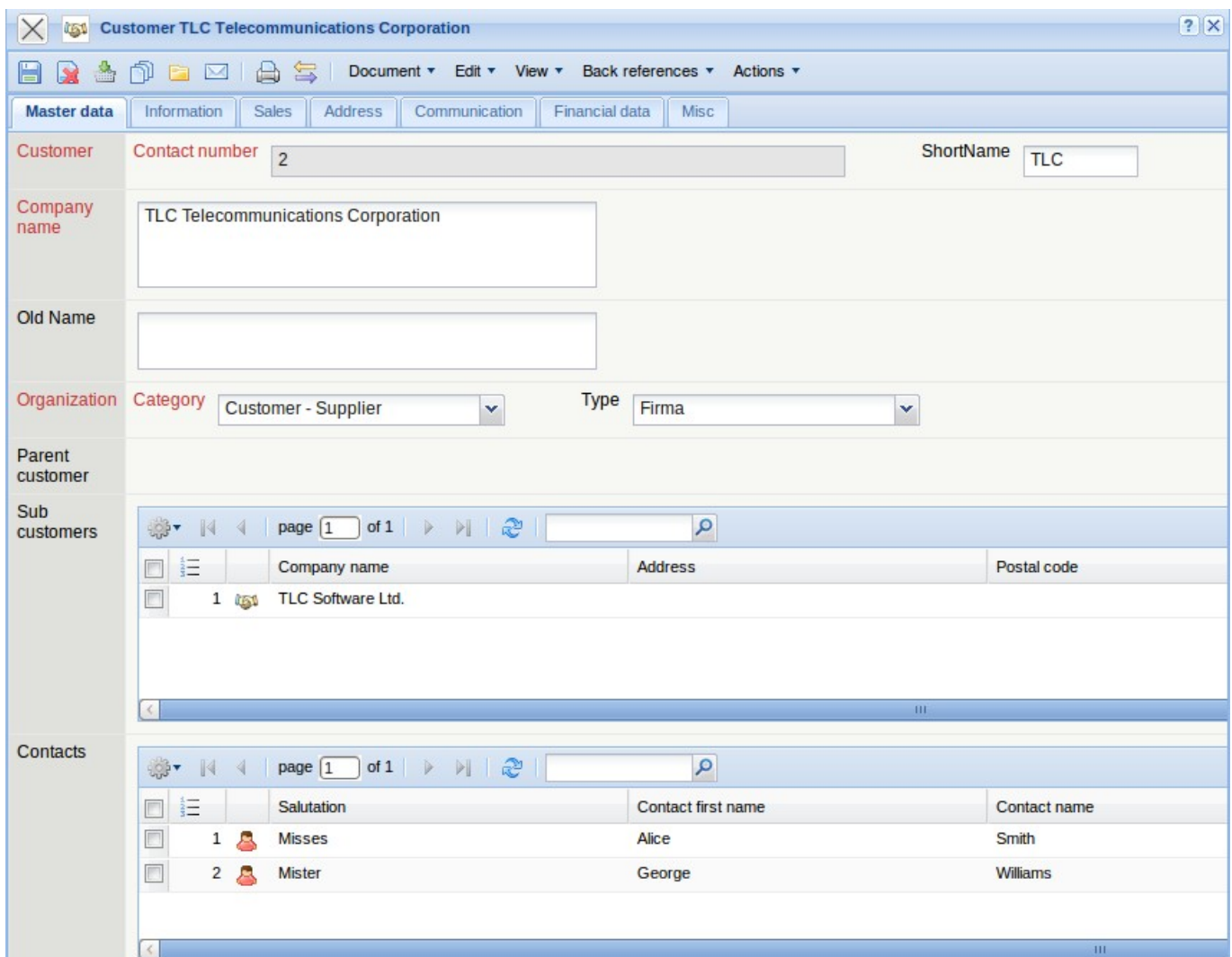
3.11.04 The Contact System

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”.

The screenshot shows a web application window titled "Contact Williams George". The interface includes a menu bar with options like "Document", "Edit", "View", "Back references", and "Actions". Below the menu is a tabbed interface with "Master data" selected. The form fields are organized into sections: "Number" (1), "Customer" (TLC Telecommunications Corporation) with a "Type" dropdown (Entrepreneur), "Salutation" (Mister) and "Titel" (Dr.) dropdowns, "Contact name" (Williams) and "Contact first name" (George), "Department" and "Function" fields, "Phone number" (+44 845 400-5000) and "Fax number" (+44 1234564567), "Cell phone number", "Email" (williams@tlc.com) with a "mailto:williams@tlc.com" link and a green checkmark, and a "Note" field.

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.

A screenshot of a 'Customer' document form. The form has a title bar 'Customer' and a menu bar with 'Document', 'Edit', 'View', and 'Actions'. Below the menu bar are tabs: 'Master data', 'Information', 'Sales', 'Address', 'Communication', 'Financial data', and 'Misc'. The 'Master data' tab is active. The form contains several fields: 'Contact number' with the value '5', 'ShortName' (empty), 'Company name' (empty), 'Old Name' (empty), 'Organization' with 'Category' and 'Type' dropdown menus, 'Parent customer' (empty), 'Sub customers' with a 'No entries' button, and 'Contacts' with a 'No entries' button.

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.

The screenshot shows the 'Customer' form with the 'Master data' tab selected. The form contains the following fields:

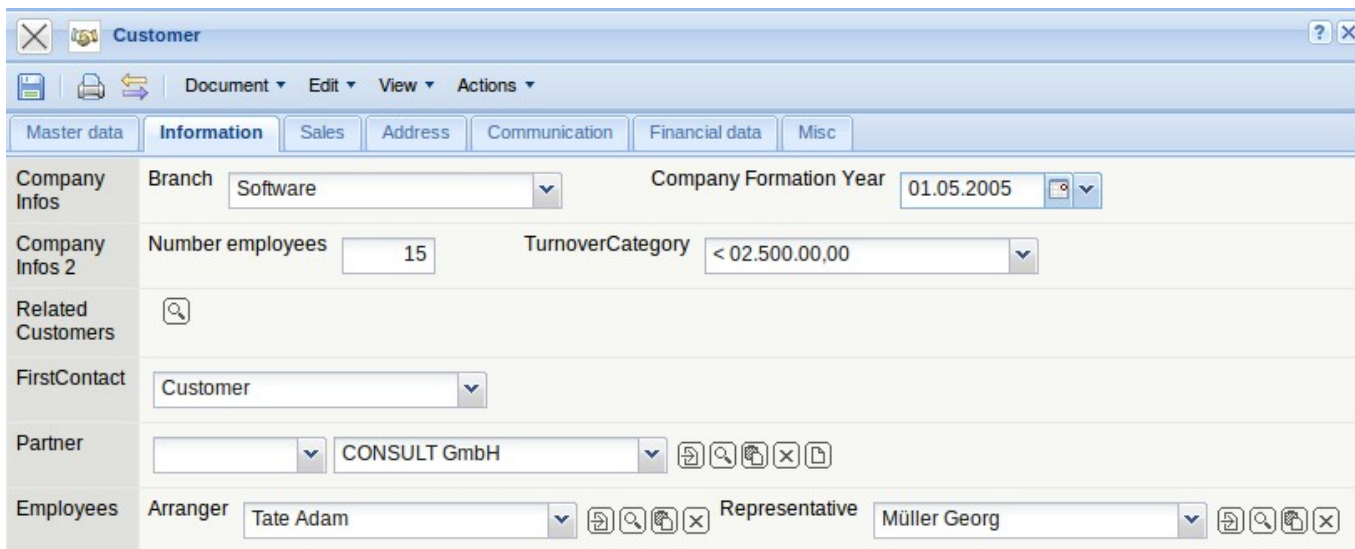
- Customer:** Contact number (5), ShortName (empty)
- Company name:** John Green Ltd.
- Old Name:** (empty)
- Organization:** Category (Customer), Type (Firm)
- Parent customer:** (empty)
- Sub customers:** No entries
- Contacts:** No entries

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

The screenshot shows the 'Customer' form with the 'Information' tab selected. The form contains the following fields:

- Company Infos:** Branch (dropdown), Company Formation Year (dropdown)
- Company Infos 2:** Number employees (text), TurnoverCategory (dropdown)
- Related Customers:** (search icon)
- FirstContact:** (dropdown)
- Partner:** (dropdown), (dropdown), (copy), (search), (refresh), (delete)
- Employees:** Arranger (dropdown), (copy), (search), (refresh), (delete), Representative (dropdown), (copy), (search), (refresh), (delete)

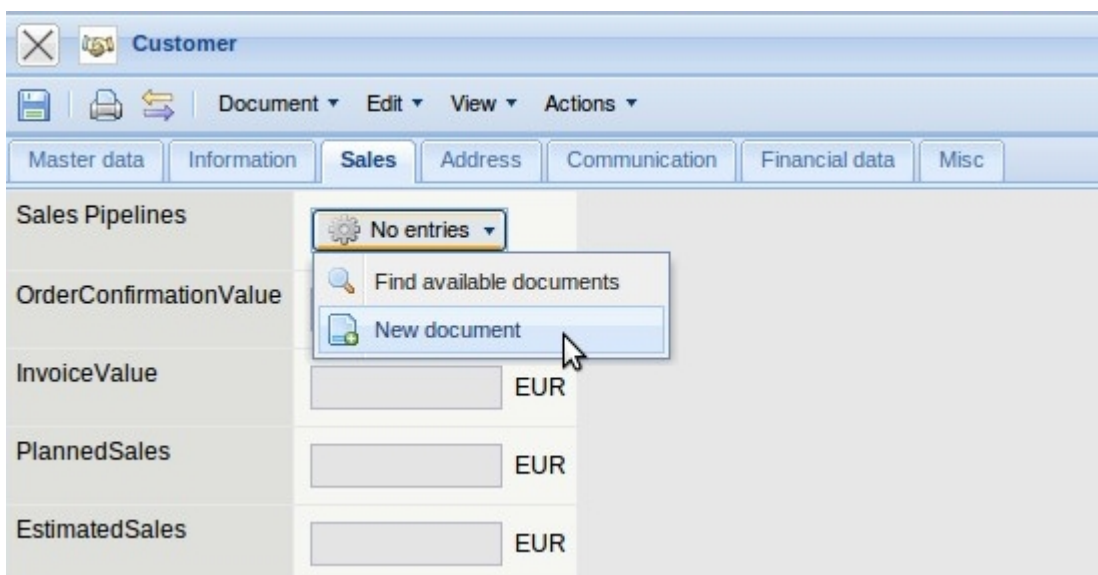
The branch, company formation year, number of employees, turnover and further information as the type of first contact, partner and employee can be entered here.



The screenshot shows the SAP Customer Master Data - Information tab. The fields are as follows:

Company Infos	Branch	Software	Company Formation Year	01.05.2005
Company Infos 2	Number employees	15	TurnoverCategory	< 02.500.00,00
Related Customers	[Search icon]			
FirstContact	Customer			
Partner	CONSULT GmbH			
Employees	Arranger	Tate Adam	Representative	Müller Georg

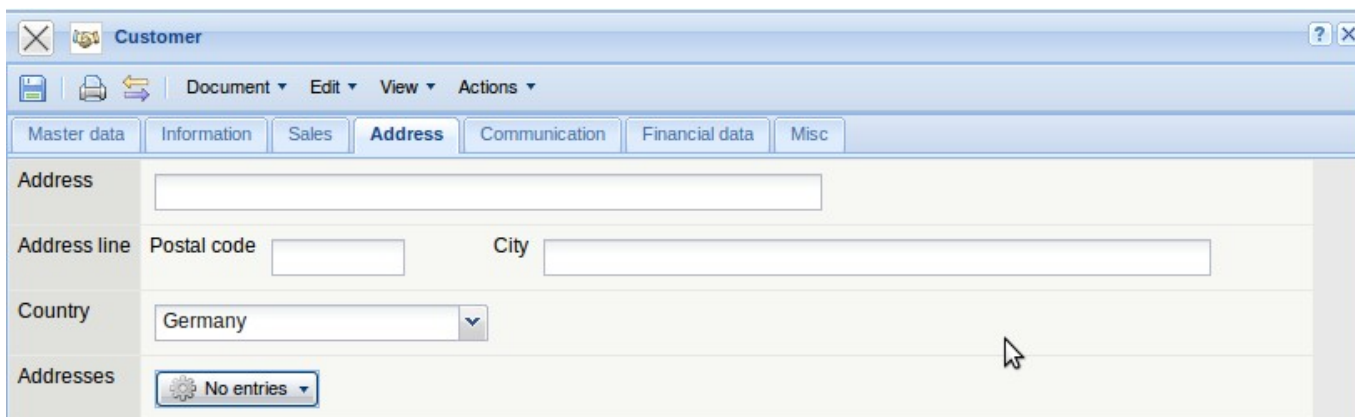
On the "Sales" tab sales pipelines can be entered and order confirmation value, invoice value, planned sales and estimated sales are displayed.



The screenshot shows the SAP Customer Master Data - Sales tab. The fields are as follows:

Sales Pipelines	No entries	
OrderConfirmationValue	Find available documents	
InvoiceValue	[Input field]	EUR
PlannedSales	[Input field]	EUR
EstimatedSales	[Input field]	EUR

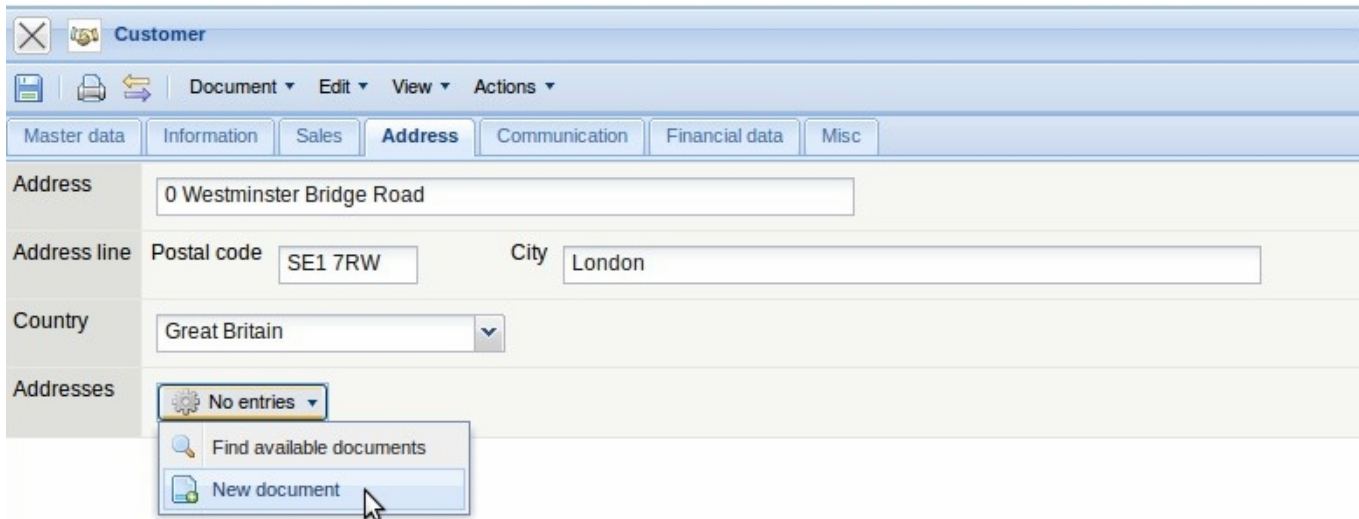
Then change to the next tab is "Address".



The screenshot shows the SAP Customer Master Data - Address tab. The fields are as follows:

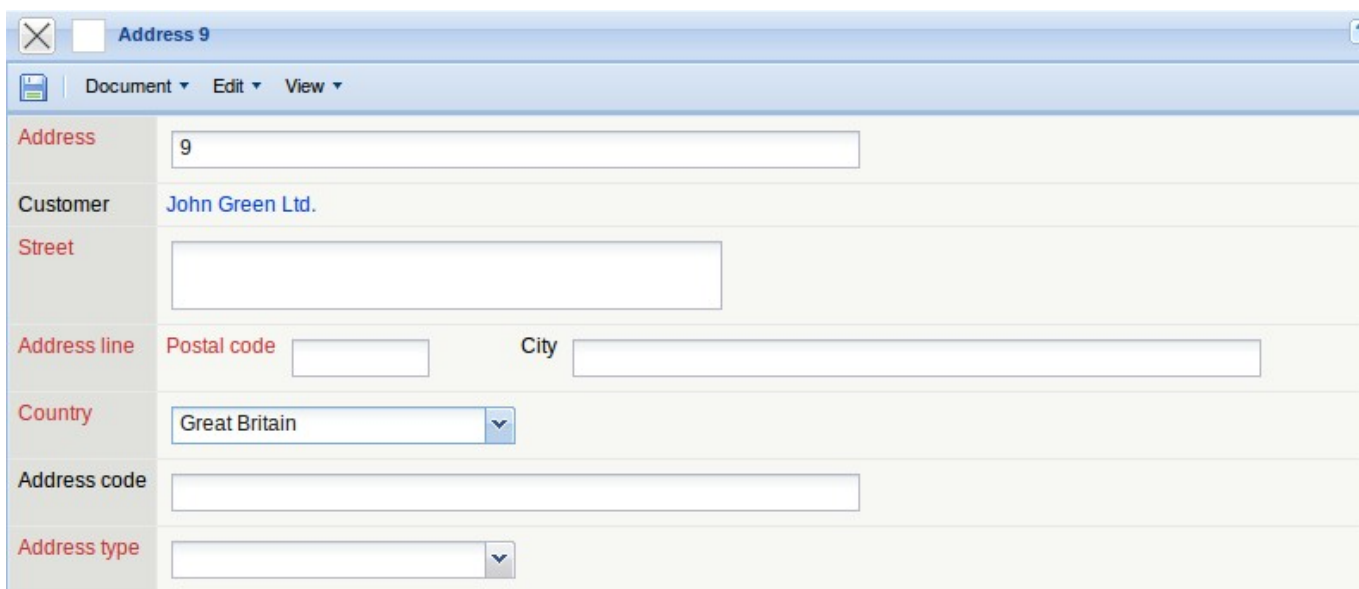
Address	[Input field]	
Address line	Postal code	City
Country	Germany	
Addresses	No entries	

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



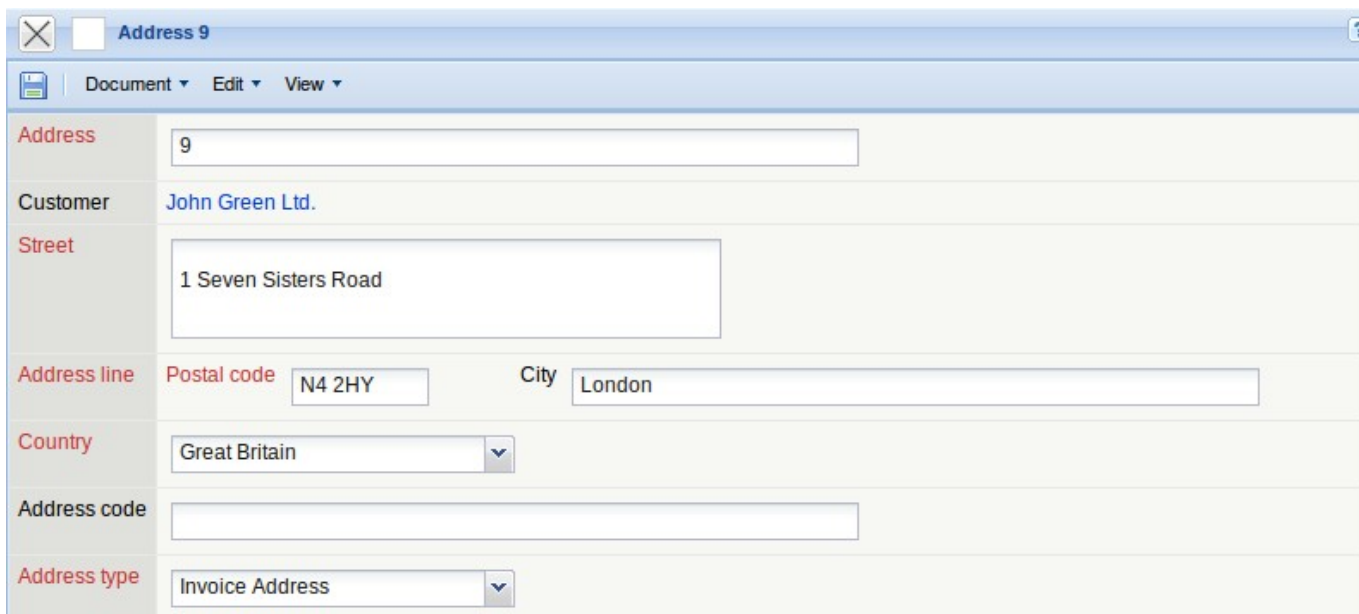
The screenshot shows the SAP Customer Address form. The title bar reads 'Customer'. The menu bar includes 'Document', 'Edit', 'View', and 'Actions'. The navigation tabs are 'Master data', 'Information', 'Sales', 'Address', 'Communication', 'Financial data', and 'Misc'. The 'Address' tab is active. The form fields are: Address (0 Westminster Bridge Road), Address line (Postal code: SE1 7RW, City: London), Country (Great Britain), and Addresses (No entries). A context menu is open over the 'Addresses' field, showing options: 'Find available documents' and 'New document'.

Further (differing) addresses for the customer can be ...



The screenshot shows the SAP Address 9 form. The title bar reads 'Address 9'. The menu bar includes 'Document', 'Edit', and 'View'. The form fields are: Address (9), Customer (John Green Ltd.), Street (empty), Address line (Postal code: empty, City: empty), Country (Great Britain), Address code (empty), and Address type (empty).

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



The screenshot shows the SAP Address 9 form with a different address. The title bar reads 'Address 9'. The menu bar includes 'Document', 'Edit', and 'View'. The form fields are: Address (9), Customer (John Green Ltd.), Street (1 Seven Sisters Road), Address line (Postal code: N4 2HY, City: London), Country (Great Britain), Address code (empty), and Address type (Invoice Address).

After saving the document ...

The screenshot shows the SAP CRM interface for 'Customer John Green Ltd.' with the 'Address' tab selected. The form contains the following fields:

- Address: 0 Westminster Bridge Road
- Address line: Postal code SE1 7RW, City London
- Country: Great Britain

Below the form is a table of addresses:

Address	Address type	Street	Postal code	City
1 9	Invoice Address	1 Seven Sisters Road	N4 2HY	London

... the communication data can be entered in the "communication" tab.

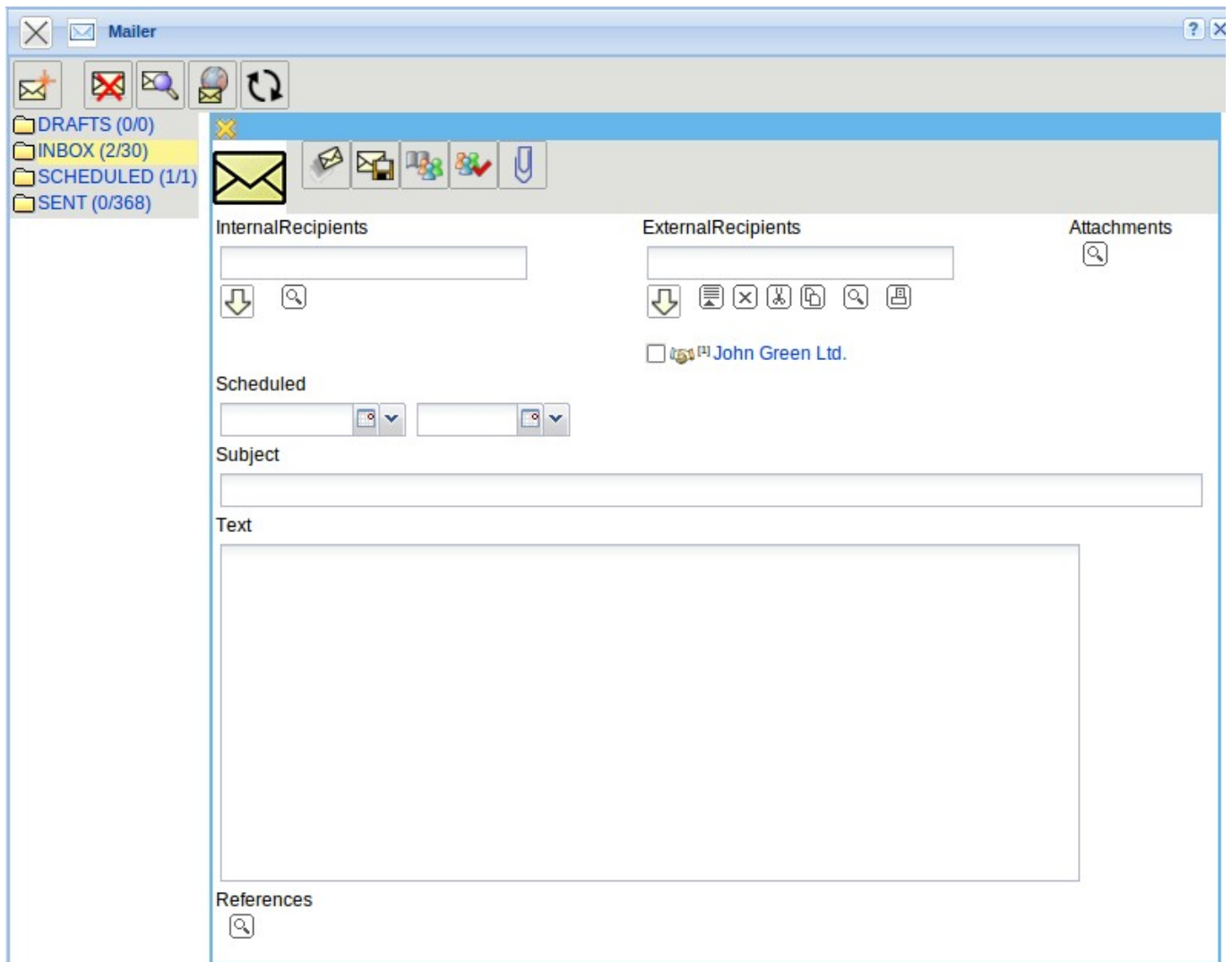
On the "communication" tab, the contact's language, telephone number, fax, e-mail and website address can be entered.

The screenshot shows the SAP CRM interface for 'Customer John Green Ltd.' with the 'Communication' tab selected. The form contains the following fields:

- Language: English
- Phone number: 020-74008080
- Fax number: 020-74008085
- Email: info@jgreen.com (with a mailto:info@jgreen.com link and a green checkmark)
- WWW: www.john-green.com (with a http://www.john-green.com link and a green checkmark)
- Meetings: No entries

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 ...

The screenshot shows the SAP Customer Master record for 'Customer John Green Ltd.' in the 'Financial data' tab. The interface includes a menu bar with options like 'Document', 'Edit', 'View', 'Back references', and 'Actions'. Below the menu are tabs for 'Master data', 'Information', 'Sales', 'Address', 'Communication', 'Financial data', and 'Misc'. The 'Financial data' section contains the following fields:

- Debtor/Creditor Number: Debtor [] Creditor []
- Zahlung: Terms of payment [within 14 days] Payment period [] d
- Currency: [GBP]
- Value added tax: [VAT-GB-15]
- ValueAddedTaxId: []
- TaxId: []
- Own supplier number: []
- Hourly rate: [] EUR
- Account Number: [] IBAN: []
- Bank code: [] BIC: []
- Bank name: []

... and on the "Misc" tab blocking criteria and comments can be entered.

The screenshot shows the 'Misc' tab of the SAP Customer Master record for 'Customer John Green Ltd.'. The 'Misc' tab is active, and the following fields are visible:

- Blocked:
- Reason for blocking: []
- Note: []

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 ...

The screenshot shows a software window titled "Customer John Green Ltd." with a menu bar (Document, Edit, View, Back references, Actions) and a tabbed interface (Master data, Information, Sales, Address, Communication, Financial data, Misc). The form contains the following fields:

- Customer:** Contact number (5), ShortName (JG)
- Company name:** John Green Ltd.
- Old Name:** (empty)
- Organization:** Category (Customer), Type (Firm)
- Parent customer:** (empty)
- Sub customers:** No entries (dropdown menu open)
- Contacts:** No entries (dropdown menu open)

a subsidiary or a branch can be entered.

The screenshot shows a software window titled "Customer" with a menu bar (Document, Edit, View, Actions) and a tabbed interface (Master data, Information, Sales, Address, Communication, Financial data, Misc). The form contains the following fields:

- Customer:** Contact number (6), ShortName (empty)
- Company name:** (empty)
- Old Name:** (empty)
- Organization:** Category (empty), Type (empty)
- Parent customer:** John Green Ltd.
- Sub customers:** No entries (dropdown menu)
- Contacts:** No entries (dropdown menu)

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

The screenshot shows a web application window titled "Customer John Green Information Ltd". The interface includes a menu bar with "Document", "Edit", "View", "Back references", and "Actions". Below the menu is a tabbed interface with "Master data" selected. The form contains the following fields and controls:

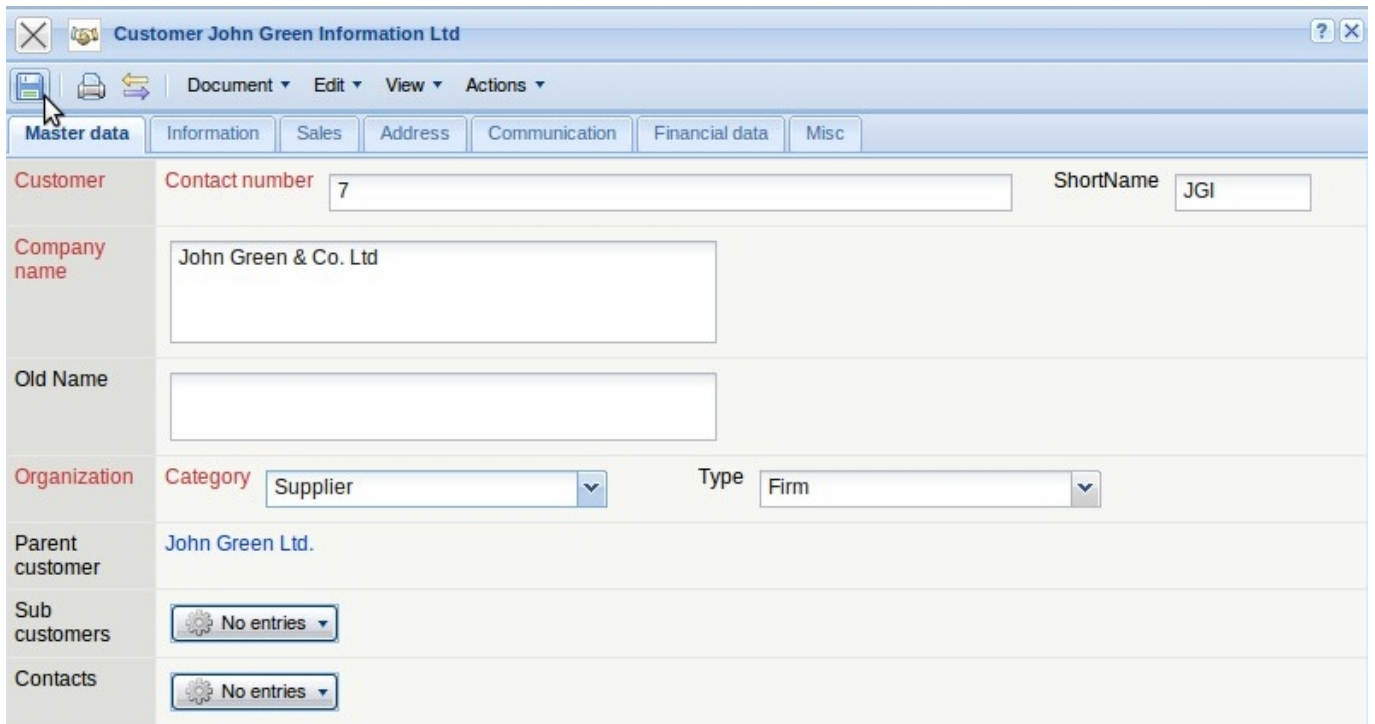
- Customer:** Contact number (6), ShortName (JGI)
- Company name:** John Green Information Ltd
- Old Name:** (empty text box)
- Organization:** Category (Partner), Type (Firm)
- Parent customer:** John Green Ltd.
- Sub customers:** No entries
- Contacts:** No entries

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

This screenshot is identical to the previous one, but with a context menu open over the "Document" menu. The menu items are:

- Create a new document from this template
- Save the document
- Copy the document
- Delete the document
- Copy this document to the clipboard
- Reload document

After saving the document ...



Customer John Green Information Ltd

Document | Edit | View | Actions

Master data | Information | Sales | Address | Communication | Financial data | Misc

Customer Contact number ShortName

Company name

Old Name

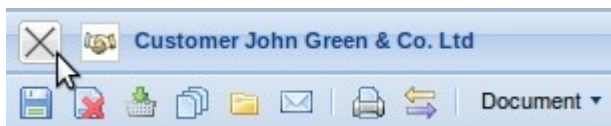
Organization Category Type

Parent customer John Green Ltd.

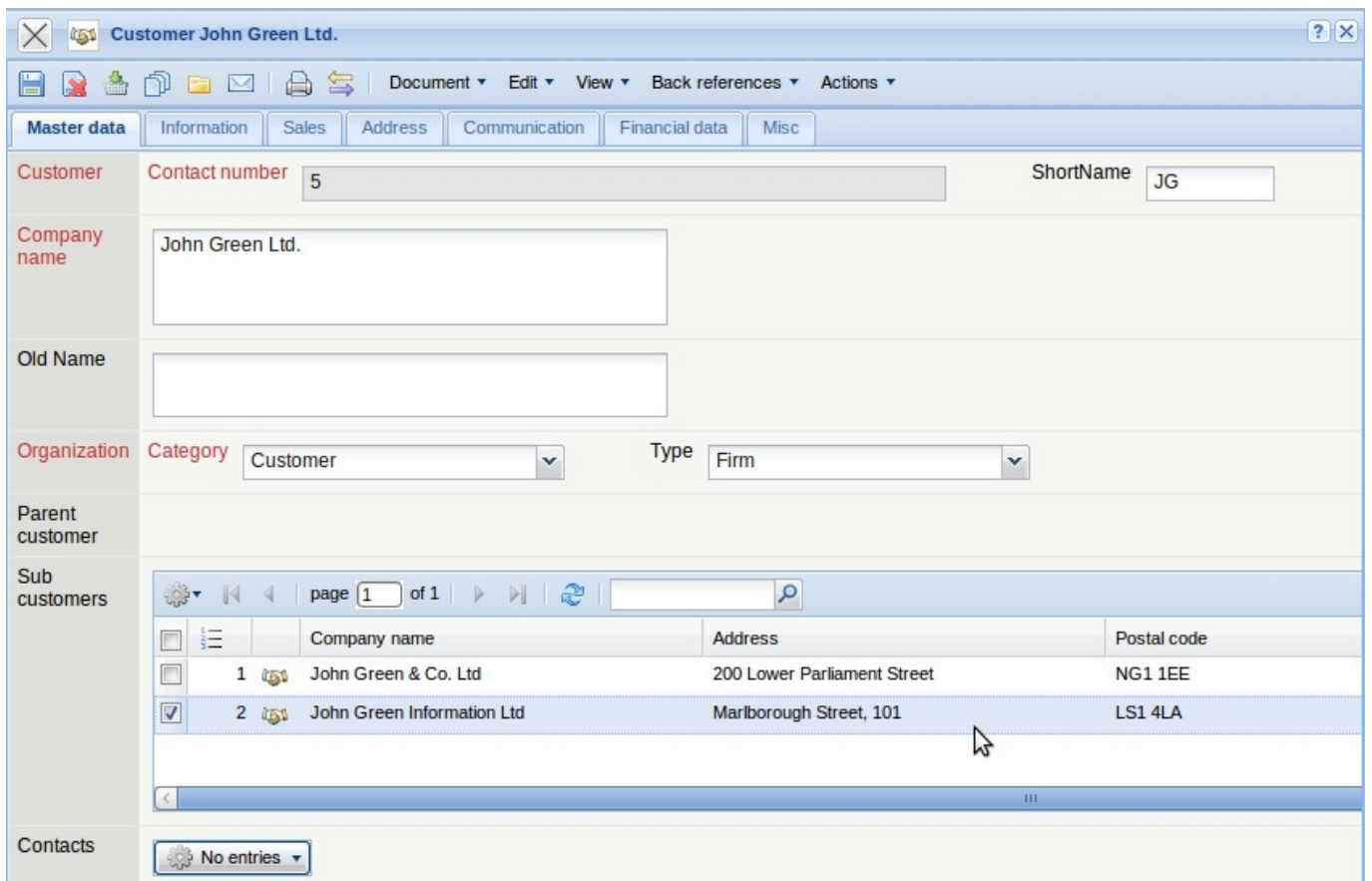
Sub customers

Contacts

... the forms of the sub-customers are closed.



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



Customer John Green Ltd.

Document | Edit | View | Back references | Actions

Master data | Information | Sales | Address | Communication | Financial data | Misc

Customer Contact number ShortName

Company name

Old Name

Organization Category Type

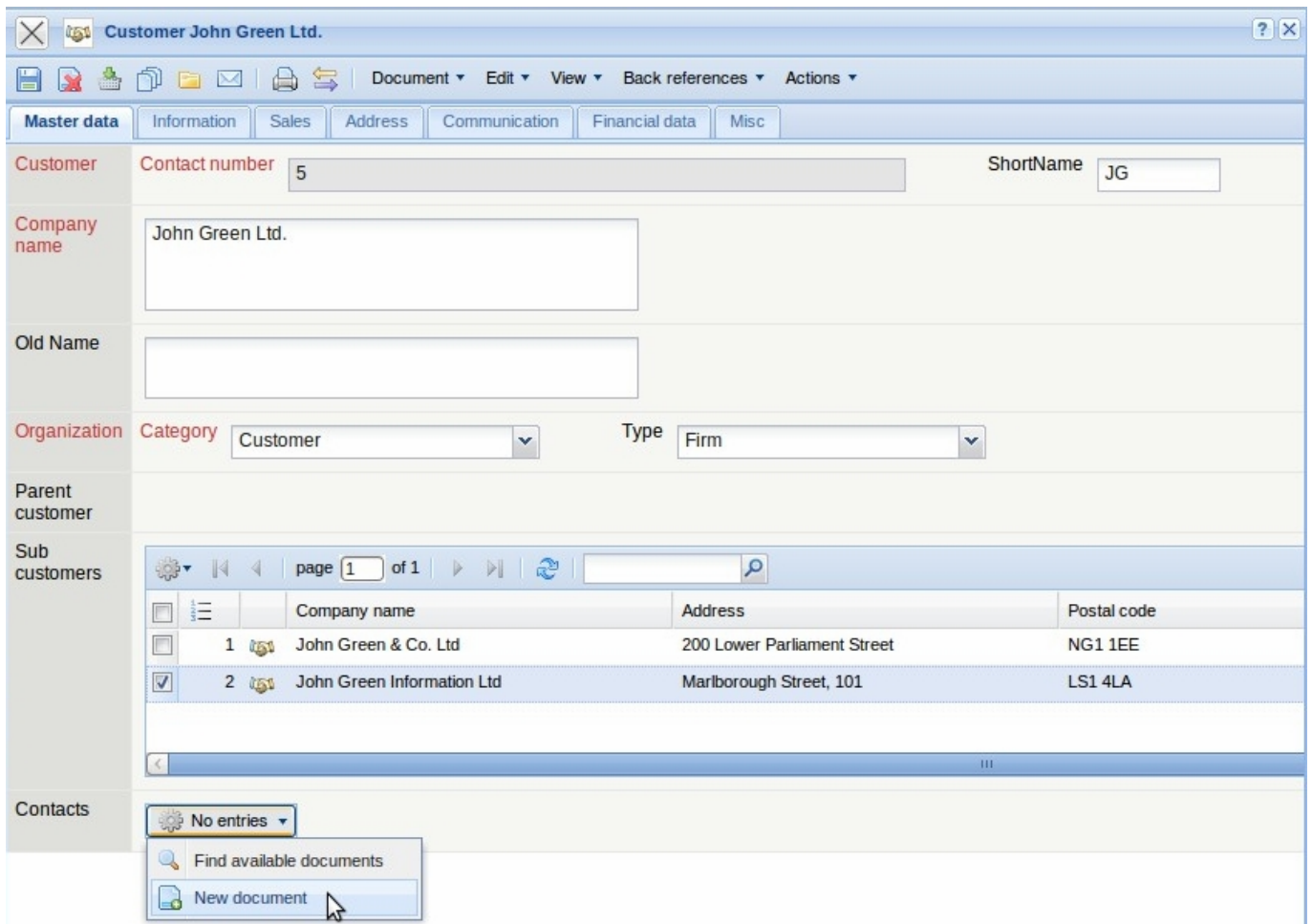
Parent customer

Sub customers

	Company name	Address	Postal code
<input type="checkbox"/>	1 John Green & Co. Ltd	200 Lower Parliament Street	NG1 1EE
<input checked="" type="checkbox"/>	2 John Green Information Ltd	Marlborough Street, 101	LS1 4LA

Contacts

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.

The screenshot shows a web-based contact form titled "Contact". The form is organized into several sections:

- Master data:** Includes tabs for "History", "Office", "Details", "Privat", and "Misc".
- Customer Information:** Fields for "Number" (5.2), "Customer" (John Green Ltd.), and "Type" (dropdown).
- Salutation and Title:** Fields for "Salutation" (dropdown) and "Titel" (dropdown).
- Contact Name:** Fields for "Contact first name" and "Department".
- Phone and Fax:** Fields for "Phone number" (020-74008080) and "Fax number" (020-74008080).
- Cell phone number:** An empty field.
- Email:** An empty field with a green checkmark icon.
- Note:** A large empty text area.

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

The screenshot shows the same contact form, now titled "Contact Green John". The fields are filled with the following information:

- Number:** 5.2
- Customer:** John Green Ltd.
- Salutation:** Mister
- Titel:** Dr.
- Contact first name:** John
- Contact name:** Green
- Phone number:** 020-74008080
- Fax number:** 020-74008080
- Email:** johngreen@green.com (with a "mailto:johngreen@green.com" link and a green checkmark icon)

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

The screenshot shows the 'History' tab of the CRM interface for 'Contact Green John'. The interface includes a menu bar with 'Document', 'Edit', 'View', 'Back references', and 'Actions'. Below the menu are tabs for 'Master data', 'History', 'Office', 'Details', 'Privat', and 'Misc'. The 'History' tab is active, displaying three sections: 'Actions', 'TimeEntries', and 'Meeting'. Each section has a table with columns for ID, icon, date, name, and other details. The 'Actions' table has columns: DueOn, Arranger, Actiontype, Checked, and Note. The 'TimeEntries' table has columns: Name and Date. The 'Meeting' table has a column: Title.

ID	Icon	Date	Name	Other
1	[Icon]	23.11.2009 00:00:00	Conner Jane	General call

ID	Icon	Date	Name
1	[Icon]	23.11.2009 11:00:00	Action 6-6

ID	Icon	Title
1	[Icon]	Meeting 2-4

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

The screenshot shows the 'Office' tab of the CRM interface for 'Contact Green John'. The interface includes a menu bar with 'Document', 'Edit', 'View', 'Back references', and 'Actions'. Below the menu are tabs for 'Master data', 'History', 'Office', 'Details', 'Privat', and 'Misc'. The 'Office' tab is active, displaying a form with the following fields: 'Office' (text input with value 'Management'), 'Supervisor' (dropdown menu with value 'Green John'), 'Assistant' (empty dropdown menu), 'Related contacts' (checkboxes and icons for 'Milesen James', 'Sander Peter', and 'Smith Alice'), and 'EmploymentDate' (calendar icon and dropdown menu).

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 Adresdaten eingegeben werden.

The screenshot shows the 'Details' tab of a contact record for 'Contact Green John'. The interface includes a menu bar with options like 'Document', 'Edit', 'View', 'Back references', and 'Actions'. Below the menu are tabs for 'Master data', 'History', 'Office', 'Details', 'Privat', and 'Misc'. The 'Details' tab is active, showing the following fields:

- Profession: Business Management
- Organization: BMO
- Language: English (dropdown)
- Address: 0 Westminster Bridge Road
- Address line: Postal code SE1 7RW, City London
- Country: Great Britain (dropdown)

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

The screenshot shows the 'Privat' tab of the contact record for 'Contact Green John'. The 'Privat' tab is active, showing the following fields:

- Phone private: 020-11223344
- HandyPrivate: (empty)
- FaxNumberPrivate: 020-11223349
- EmailPrivate: (empty) with a green checkmark icon to the right.
- AddressPrivat: Viktoria Street
- AddressLinePrivat: Postal code SL4, City Windor
- CountryPrivat: GreatBritain (dropdown)
- Birthday: (empty) with a calendar icon and a dropdown arrow.
- Hobby: golf, tennis

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

The screenshot shows a web interface for a contact named 'Green John'. The 'Misc' tab is active, displaying several data fields: 'Blocked' with a checkbox, 'Reason for blocking' with an empty text box, 'Employee' with a dropdown menu showing 'Tate Adam', 'PreviousCompany' with a text box containing 'SAP AG', 'AdditionalCurrentCompany' with an empty text box, 'NamePartner' with a text box containing 'Mary', and 'NameChildren' with an empty text box. The interface includes a menu bar with options like 'Document', 'Edit', 'View', 'Back references', and 'Actions', and a toolbar with various icons.

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

This screenshot shows the same 'Contact Green John' form, but with the 'Document' menu open. The menu items are: 'Create a new document from this template', 'Save the document', 'Copy the document', 'Delete the document', 'Copy this document to the clipboard', and 'Reload document'. The background shows the 'Master data' tab with fields for 'Number' (5.2), 'Customer' (Customer), 'Salutation' (Mister), 'Contact name' (Green), and 'Contact first name' (John).

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

After saving the document ...

The screenshot shows a software window titled "Contact Green John". It features a menu bar with "Document", "Edit", "View", "Back references", and "Actions". Below the menu is a toolbar with icons for saving, printing, and other actions. The main area contains several input fields: "Number" (5.2), "Customer" (Customer), "Type" (dropdown), "Salutation" (Mister), "Titel" (Dr.), "Contact name" (Green), "Contact first name" (John), and "Department" (empty). A "Save the document" tooltip is visible over the save icon.

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

The screenshot shows a software window titled "Customer John Green Ltd.". It has a menu bar with "Document", "Edit", "View", "Back references", and "Actions". Below the menu is a toolbar with icons for saving, printing, and other actions. The main area contains several input fields: "Customer" (Contact number 5, ShortName JG), "Company name" (John Green Ltd.), "Old Name" (empty), "Organization" (Category Customer, Type Firm), "Parent customer" (empty), and "Sub customers" (a table with 2 entries). A "Contacts" section at the bottom shows "No entries".

	Company name	Address	Postal code	City
1	John Green & Co. Ltd	200 Lower Parliament Street	NG1 1EE	Nottingham
2	John Green Information Ltd	Marlborough Street, 101	LS1 4LA	Leeds

...continued

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