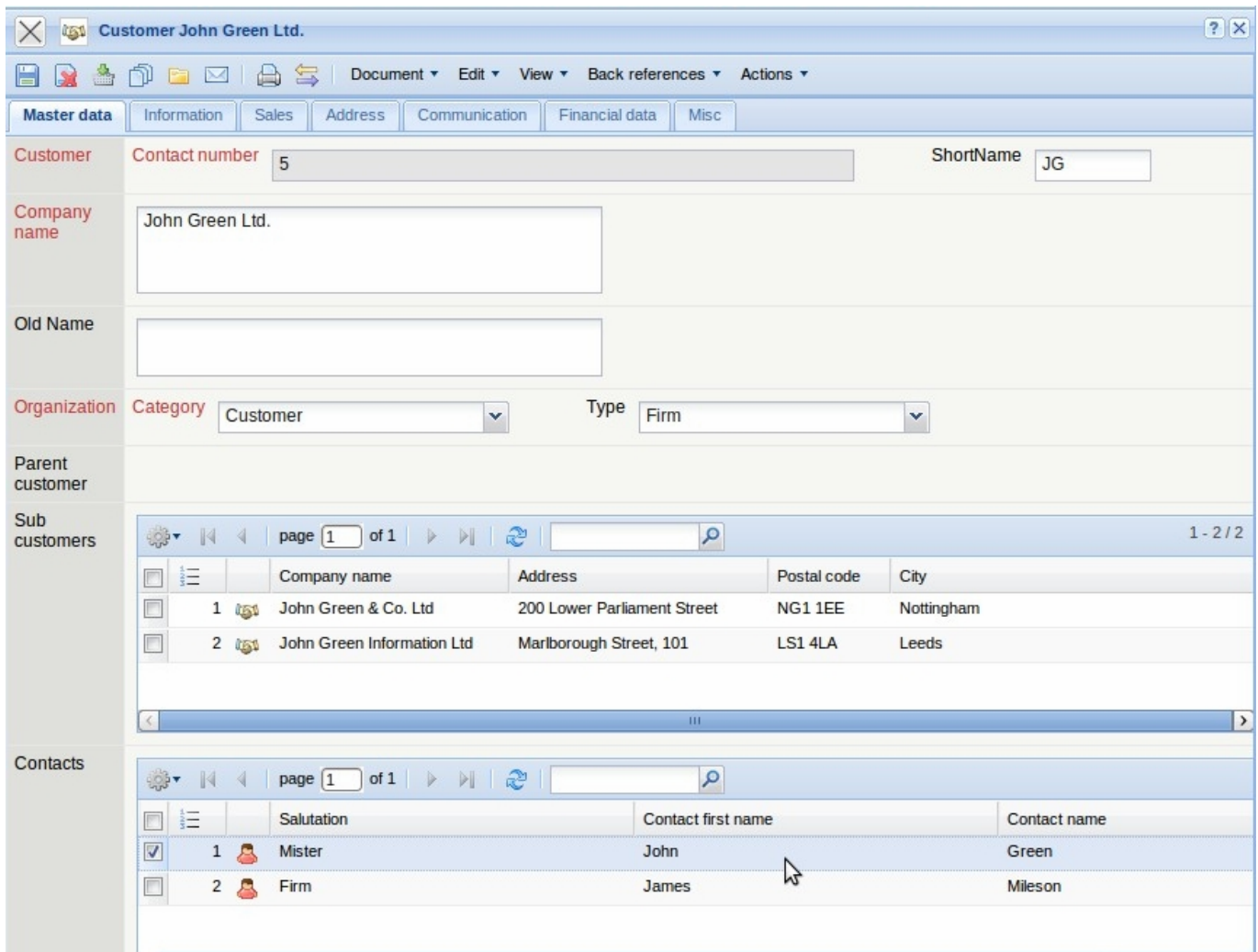


[previous](#) [Home](#) [next](#)

3.11.04 The Contact System (... continued)

For each contact person any number of actions can be defined. Actions can, for example be requests, appointments, reminders, etc. These actions will log important events with (history) and can furthermore be used for the acquisition and public relations.



These actions are defined using the function "New document" in the document type "contact person":

The screenshot shows the 'Contact Green John' interface. The top navigation bar includes 'Document', 'Edit', 'View', 'Back references', and 'Actions'. Below this, there are tabs for 'Master data', 'History', 'Office', 'Details', 'Privat', and 'Misc'. The 'TimeEntries' section is active, displaying a table with columns 'Name' and 'Date'. A table entry shows 'Action 6-6' on '23.11.2009 11:00:00'. A context menu is open over the table, with 'New document' selected. Other sections like 'Campaign' and 'Meeting' are also visible, each with a 'No entries' message.

The system generates a new document with the type "action" and populates the contact person and other various values automatically.

The screenshot shows the 'Action 5.2-1 Green John' document form. The form is divided into sections: 'Master data' and 'Misc'. The 'Action' field contains '5.2-1'. The 'Customer' field is empty. The 'Projectdescription' field is empty. The 'DueOn' field shows '24.11.2009' and '00:00:00'. The 'Actiontype' field is empty. The 'Priority' field is set to '3 - normal priority'. The 'Arranger' field is set to 'Conner Jane'. The 'Note' field is empty. The 'Checked' checkbox is unchecked.

After filling out the relevant fields, the document can then be saved.

Action	1		
Customer	John Green Ltd.	Contact	Green John
Projectdescription			
DueOn	30.11.2009	10:00:00	
Actiontype	General call		
Priority	3 - normal priority		
Arranger	Conner Jane		
Note			
Checked	<input checked="" type="checkbox"/>		

Further actions can be generated using the functionality “Create new document from this template”.

Action			
Customer		Contact	Green John
Projectdescription			
DueOn	30.11.2009	10:00:00	
Actiontype	General call		
Priority	3 - normal priority		
Arranger	Conner Jane		

This next action is sending information material through a request. This action is marked as completed. The check box “checked” indicates a completed action. If this flag is not set, the defined action is a resubmission, which can be displayed in the contact chart.

The screenshot shows a software window titled "Action 5.2-2 Green John General call". The window has a menu bar with "Document", "Edit", and "View". Below the menu bar, there are tabs for "Master data" and "Misc". The main area contains a form with the following fields:

- Action:** 5.2-2
- Customer:** John Green Ltd.
- Contact:** Green John
- Projectdescription:** (empty)
- DueOn:** 24.11.2009 15:00
- Actiontype:** Information
- Priority:** 3 - normal priority
- Arranger:** Conner Jane
- Note:** Product description for product B sent per e-mail
- Checked:**

In the next action ...

The screenshot shows the same software window, but now titled "Action 5.2-2 Green John Information". The "Document" menu is open, showing the following options:

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

... a presentation is offered on 30.11.2009.

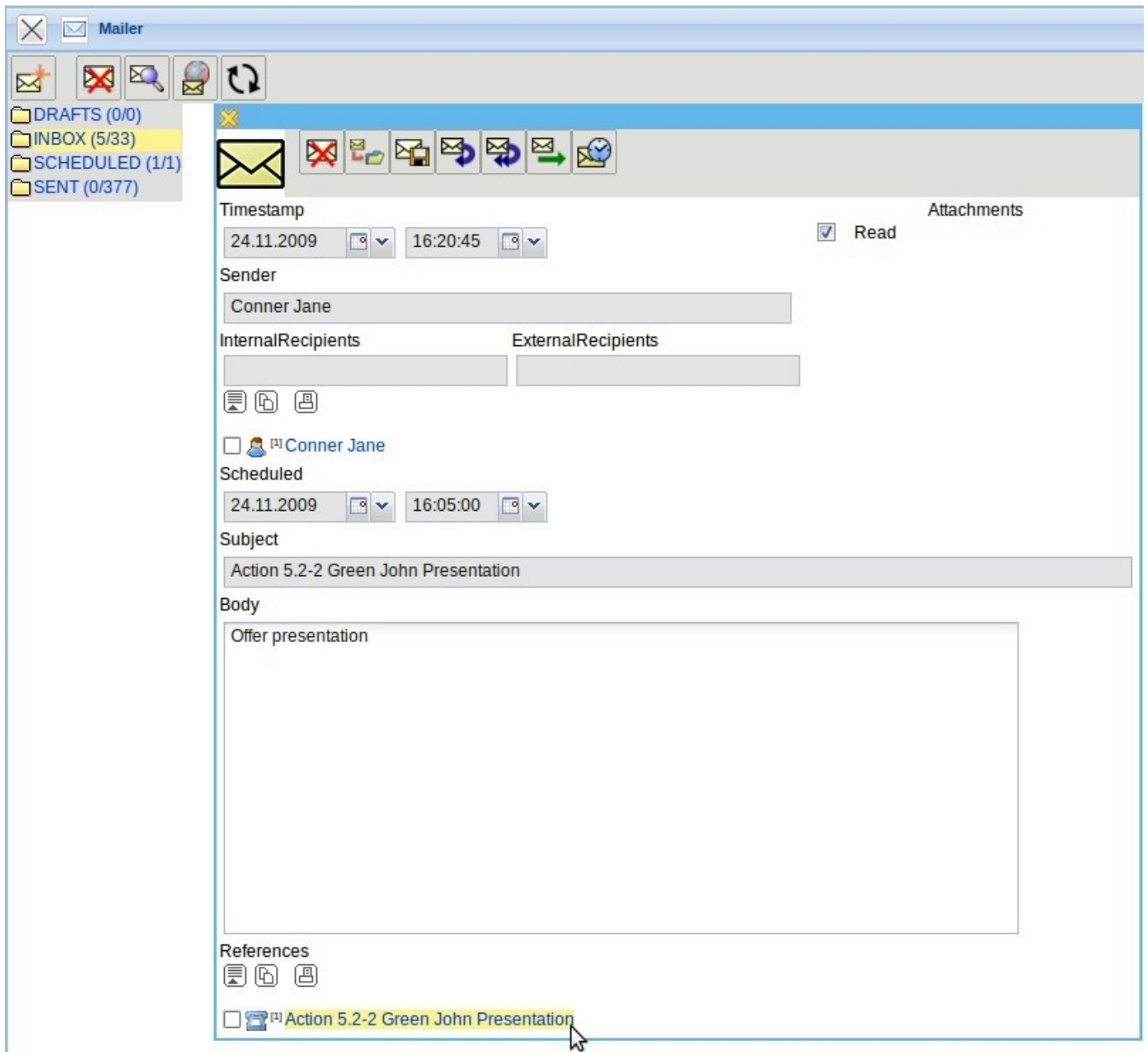
The screenshot shows a software window titled "Action 5.2-2 Green John Information". The window has a menu bar with "Document", "Edit", "View", and "Back references". Below the menu bar is a toolbar with icons for saving, printing, and other actions. A tooltip "Save the document" is visible over the save icon. The main area contains a form with the following fields:

- Action: 5.2-2
- Customer: John Green & Co. Ltd
- Contact: Green John
- Projectdescription: (empty)
- DueOn: 30.11.2009 10:00:00
- Actiontype: Presentation
- Priority: 3 - normal priority
- Arranger: Conner Jane
- Note: Offer presentation
- Checked:

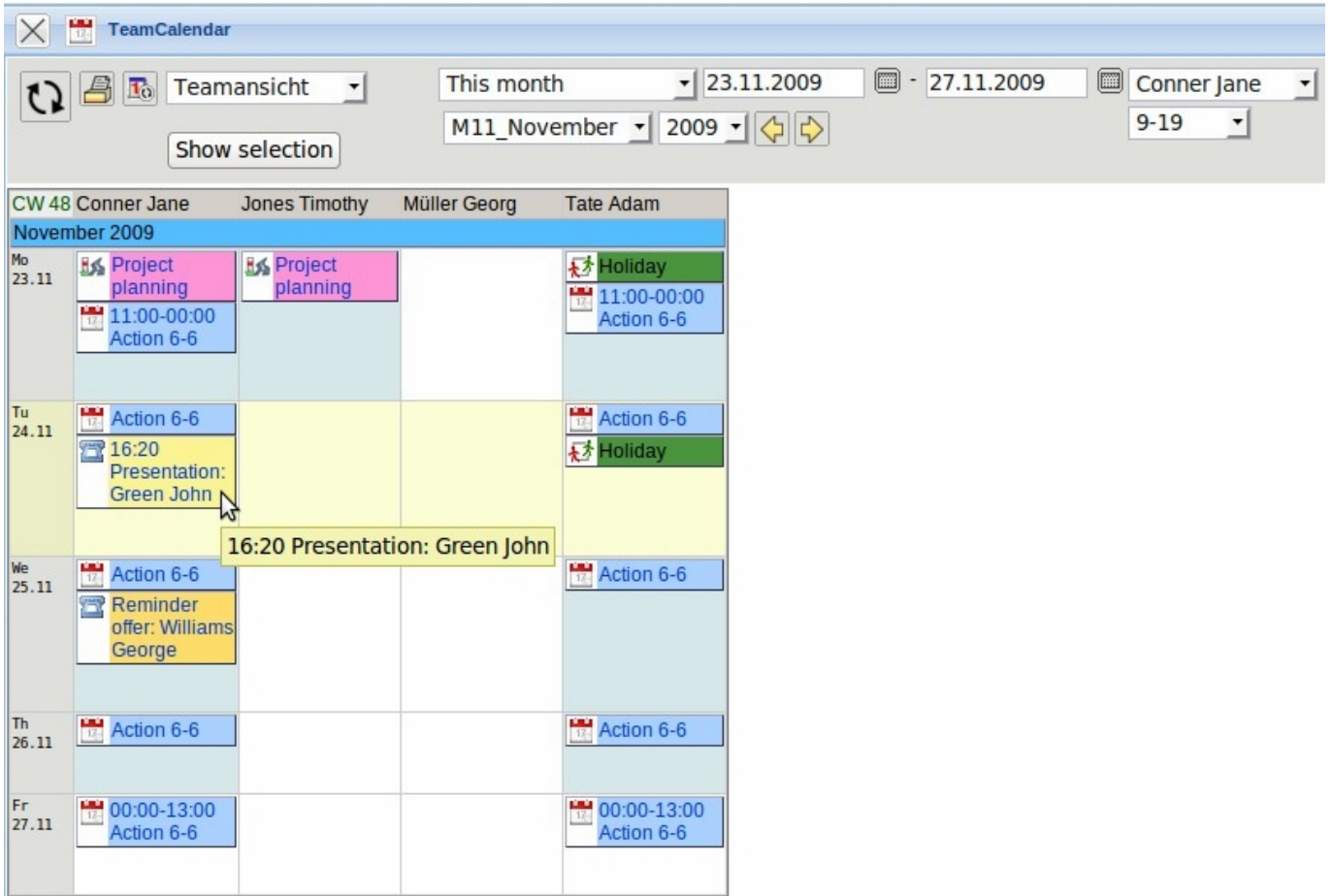
If the optional component **mailer** is used, the system generates automatically an e-mail message for this action on the given day ...



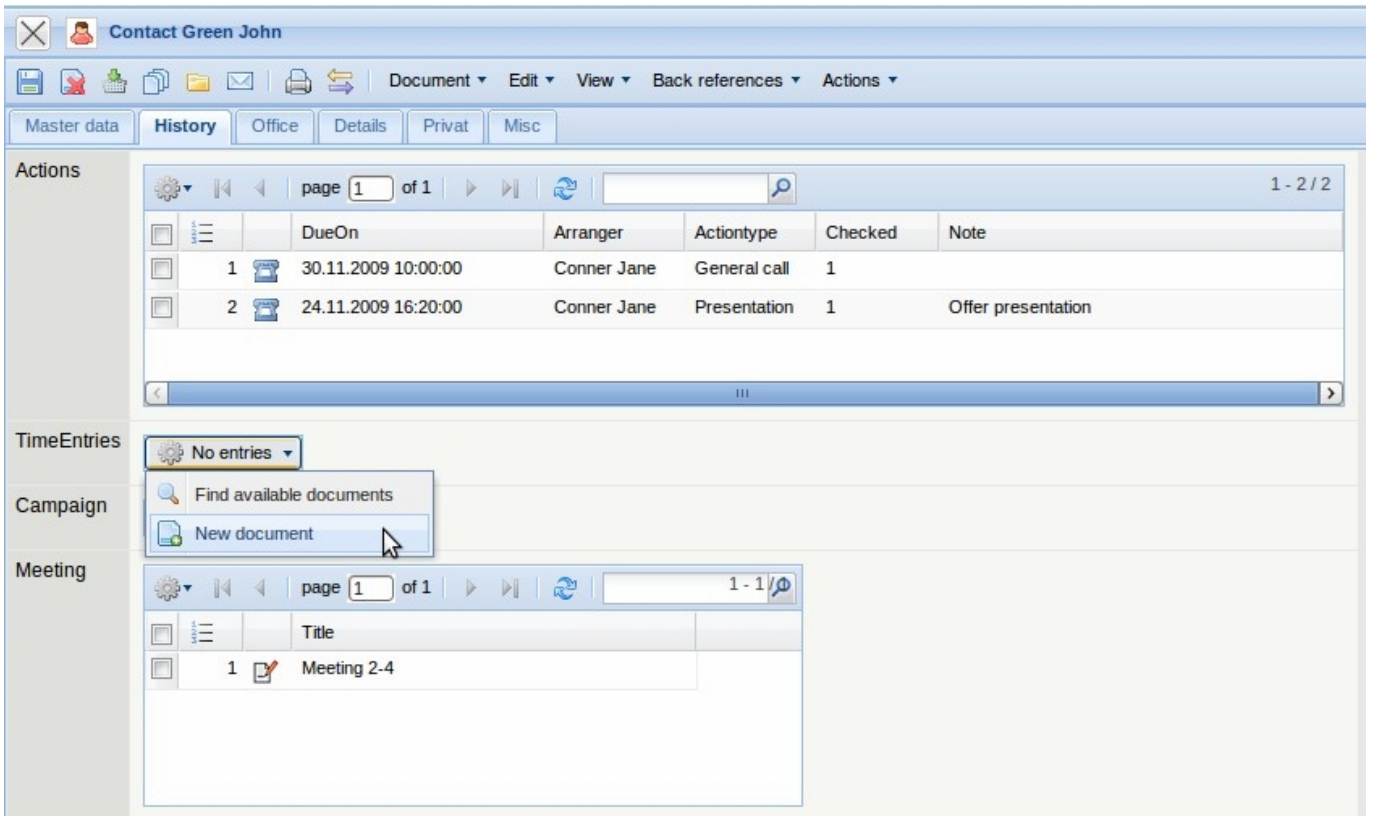
.. using the appropriate link.



If the optional component [TeamCalendar](#) is used, this action is also displayed in the group calendar (here presentation with John Green on 24.11.2009) and can be opened here.



Appointments can also be defined for the contact persons here.



In the example, an appointment (time entry) for John Green ...

Time entry Workshop 24.11.2009 17:00:00

Document Edit View Back references Actions

Main Inventions Project

Entry ID 16

Name

Category Private

Timespan From To

Inviter

Attendees Employees Unit SendInvitations

Agenda

Time entry Workshop 24.11.2009 17:00:00

Document Edit View Back references Actions

Main Inventions Project

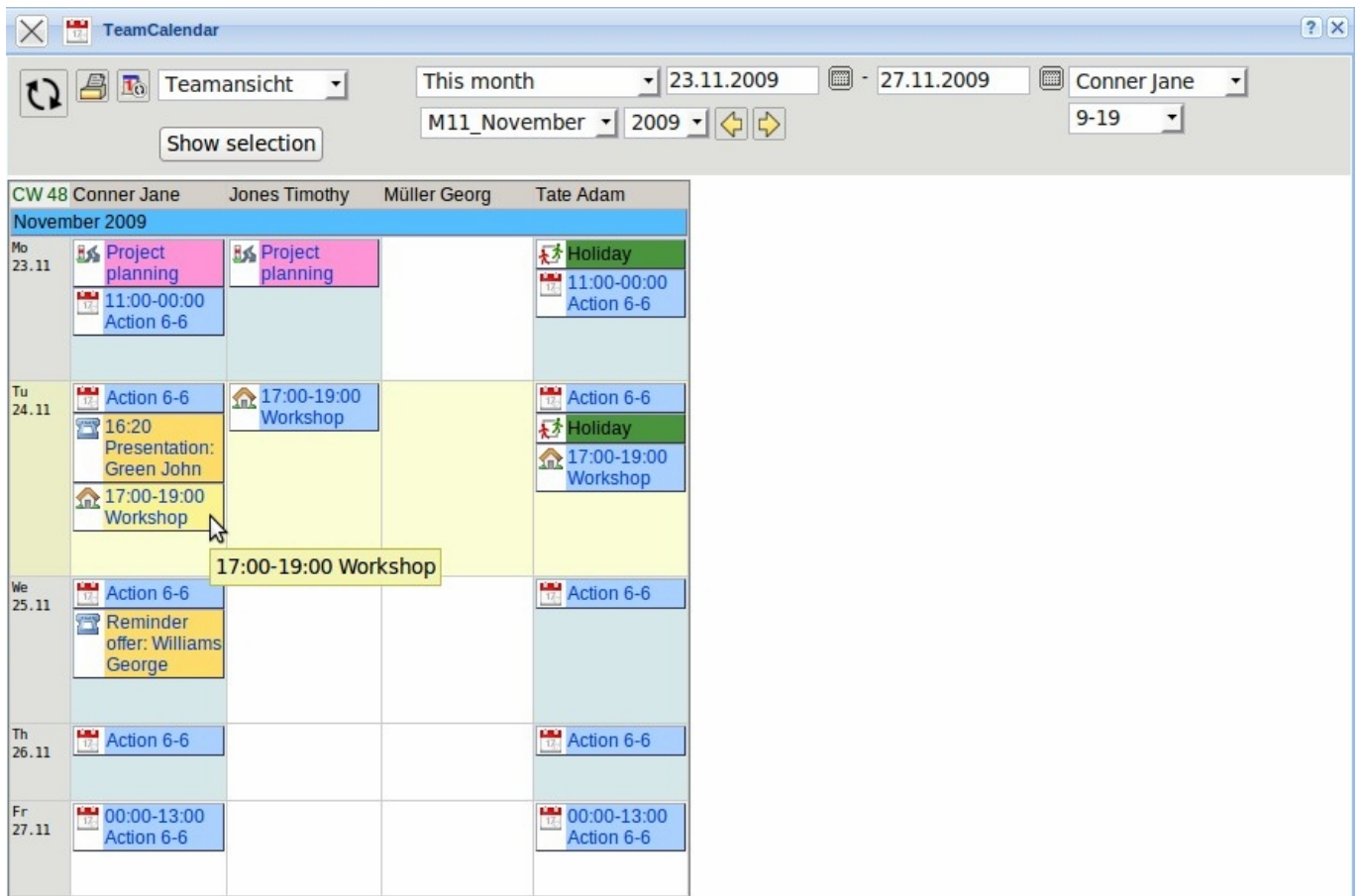
Contact Green John

Project

Job

is created for 24.11.2009 from 17:00 - 19:00:

This appointment (time entry) is then transferred to the group calendar. Note: if the group calendar is not used, the appointments can be used alternatively as actions with to-do appointments or similar.





The defined actions can be evaluated in the standard charts and in the optional [ReportMaker](#)






In the following example a contact chart is opened ...

The screenshot shows a software interface with a top navigation bar containing tabs: Standard, Modules, Tasks, Infomarket, Project List, Risk, Portfolio, Projects, Customers, and Staff. Below the navigation bar, there are three main sections: 'Extras' with an 'Absence application' icon, 'Planning' with a 'New Project' link, and 'Charting'. A dropdown menu is open under the 'Charting' section, listing various chart types: Assessment chart, CapacityChart, Contact chart (highlighted by a mouse cursor), Cost center chart, EarnedValue, Employee chart, Gantt chart, MultiMatrixChart, OrderChart, PortfolioChart, ProductChart, and Project chart. To the right of the 'Charting' section is a 'Tracking' section titled 'TimeTracker' with a clock icon, a 'Selected days' dropdown, and two date input fields both set to '25.11.2009'.

... and a chart ...

  **Contact chart**

Generate chart


 Document ▾ Edit ▾ View ▾    

InputData | Parameters | Format | Results

1. Name: *If you would like to save a chart please enter a description*

Name


Description


Chart ▾ 

Report Selection ▾

2. Input data: *To gather all the documents relevant for the chart please use the search engine (if need be repeatedly)*


Search ▾


Search word Category ▾ 

Input data  No entries ▾

3. Main parameters: *Please select parameters:*

Chart period ▾

Start  ▾

End  ▾

with all actions in the year 2009 ...

Contact chart

Generate chart

Document Edit View

InputData Parameters Format Results

1. Name: *If you would like to save a chart please enter a description*

Name:

Description:

Chart:

Report Selection:

2. Input data: *To gather all the documents relevant for the chart please use the search engine (if need be repeatedly)*

Search:

Search word: Category:

Input data

page 1 of 1

1		Contact Green John
---	--	--------------------

3. Main parameters: *Please select parameters:*

Chart period:

Start:

End:

... is generated.

Fileset

ContactChart

Date	Employee	Customer	Contact	Phone	Action	Project	Note	Checked	Definition date
30.11.2009 10:00:00	Conner Jane	John Green Ltd.	Green John	020-74008080	General call			Yes	24.11.2009
24.11.2009 04:20:00	Conner Jane	John Green Ltd.	Green John	020-74008080	Presentation		Offer presentation	No	24.11.2009

If the optional component [ReportMaker](#) is used, your own report in combination with the [advanced search](#) can be used.

In the example, the query "All open actions" is used. This query lists all actions, which are not yet

completed ...

The screenshot shows a software interface with a 'Search' window and a 'Report' configuration section. The 'Search' window has a title bar with a close button and a search icon. Below the title bar is a search bar with a magnifying glass icon and a 'Find' button. The 'Selection' dropdown is set to 'Open Actions'. The 'Name' field contains 'Open Actions'. The 'Query' field contains the following SQL query: `Action : ((Checked = "0") AND ((Employee.Name LIKE $userlastname) AND (Arranger -> Employee)) AND (DueOn <= $Datum))) SORT DueOn DESC`. Below the query field are three dropdown menus for 'Lookup Document types', 'Document fields', and 'Field values', each with an upward arrow icon. The 'Report' section has a title bar with a close button and a report icon. It contains a 'Report' dropdown set to 'Open Actions', a 'Format' dropdown set to 'VIEW', a 'Chart period' dropdown, a 'Start' field with a calendar icon, an 'End' field with a calendar icon, and a 'Period' dropdown.

... and sorts them by the descending date.

The screenshot shows a 'Query parameters' dialog box with a title bar containing a close button and the text 'Query parameters'. Below the title bar is a message: 'Please fill in missing parameters' followed by 'Wildcard facilities: *, *abc, abc* and *abc* (all, all ending with abc, all starting with abc, all containing abc)'. There are two input fields: 'Nachname' with the value 'Conner' and 'Datum' with the value '15.12.2009'. At the bottom, there are two buttons: a green checkmark button and a red 'X' button, with an 'OK' button below them.

The results of the query are then displayed in the report "action". This report lists all selected contact data of the actions.

Action	DueOn	Company	Contact	Actiontype
5.2-1	30.11.2009 10:00:00	John Green Ltd.	Green John	General call
1-13	25.11.2009 00:00:00	TLC Telecommunications Corporation	Williams George	Reminder offer
5.2-2	24.11.2009 16:20:00	John Green & Co. Ltd	Green John	Presentation
1-6	30.10.2009 00:00:00	TLC Telecommunications Corporation	Williams George	Reminder offer
1-5	09.10.2009 13:00:00	TLC Telecommunications Corporation	Williams George	Meeting

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