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3.11.04 The Customer 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.

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

Contacts

	Salutation	Contact first name	Contact name
1	Mister	John	Green
2	Firm	James	Mileson

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

The screenshot shows the 'Contact Green John' window. The 'TimeEntries' section is active, displaying a table with one entry. A dropdown menu is open for 'New document'.

Name	Date
1 Action 6-6	23.11.2009 11:00:00

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' form. The 'Master data' tab is selected, and various fields are populated.

Action	5.2-1
Customer	Green John
Projectdescription	
DueOn	24.11.2009 00:00:00
Actiontype	
Priority	3 - normal priority
Arranger	Conner Jane
Note	
Checked	☐

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

Action 5.2-1 Green John

Document ▾ Edit ▾ View ▾

Master data Misc

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: ☒

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

Action 5.2-1 Green John General call

Document ▾ Edit ▾ View ▾ Back references ▾

Master data Misc

Document menu:

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

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.

Document Edit View

Master data

Save the document

Action 5.2-2

Customer John Green Ltd. Contact Green John

Projectdescription

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 ...

Document Edit View Back references

Master data

Create a new document from this template

Save the document

Copy the document

Delete the document

Copy this document to the clipboard

Reload document

Action

Customer

Projectdescription

DueOn 24.11.2009 15:00:00

Contact Green John

... a presentation is offered on 30.11.2009.

Action 5.2-2 Green John Information

Document Edit View Back references

Save the document

Action 5.2-2

Customer John Green & Co. Ltd Contact Green John

Projectdescription

DueOn 30.11.2009 10:00:00

Actiontype Presentation

Priority 3 - normal priority

Arranger Conner Jane

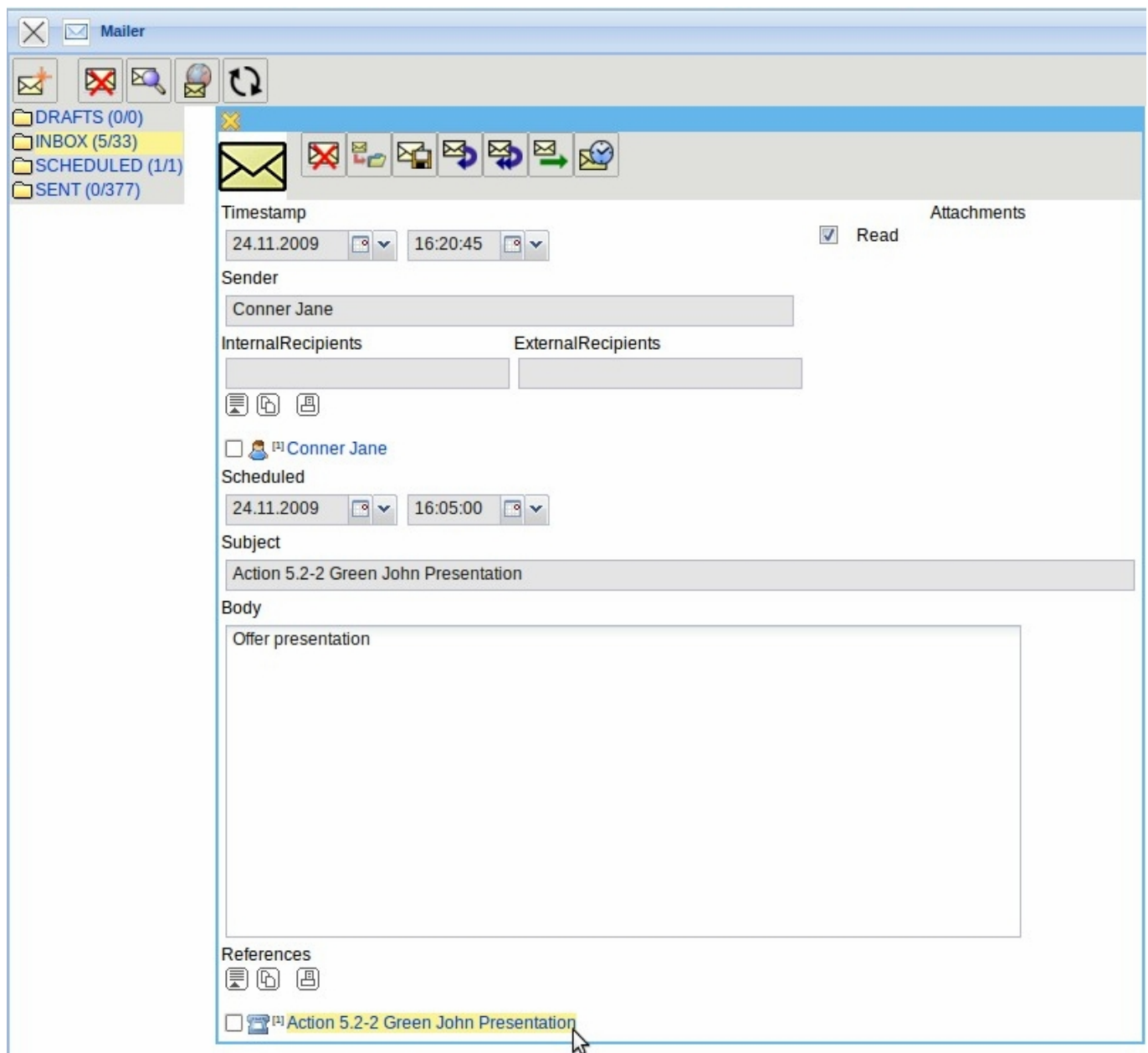
Note Offer presentation

Checked ☒

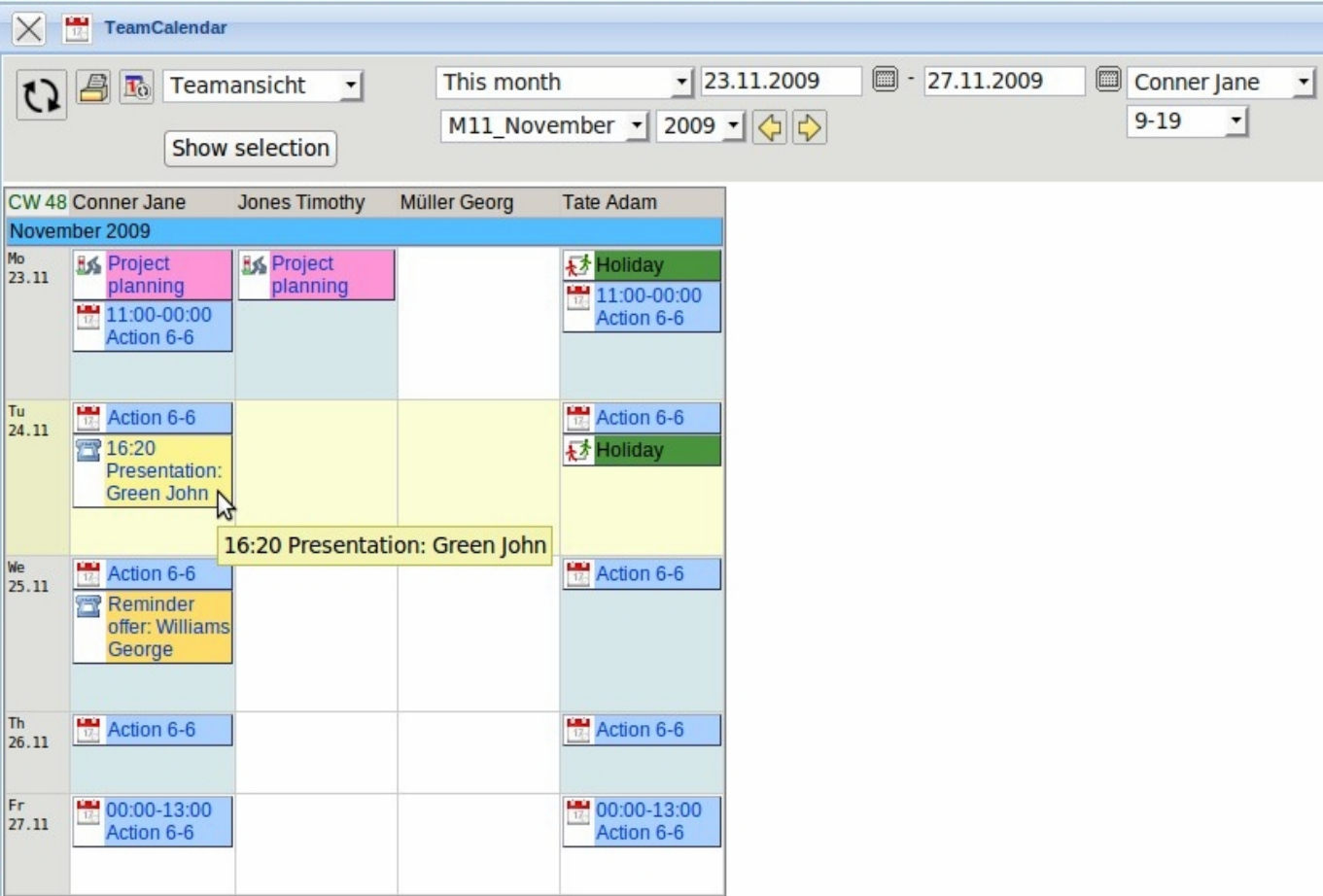
If the optional component [mailer](#) is used, the system generates automatically an e-mail message for this action on the given day ...



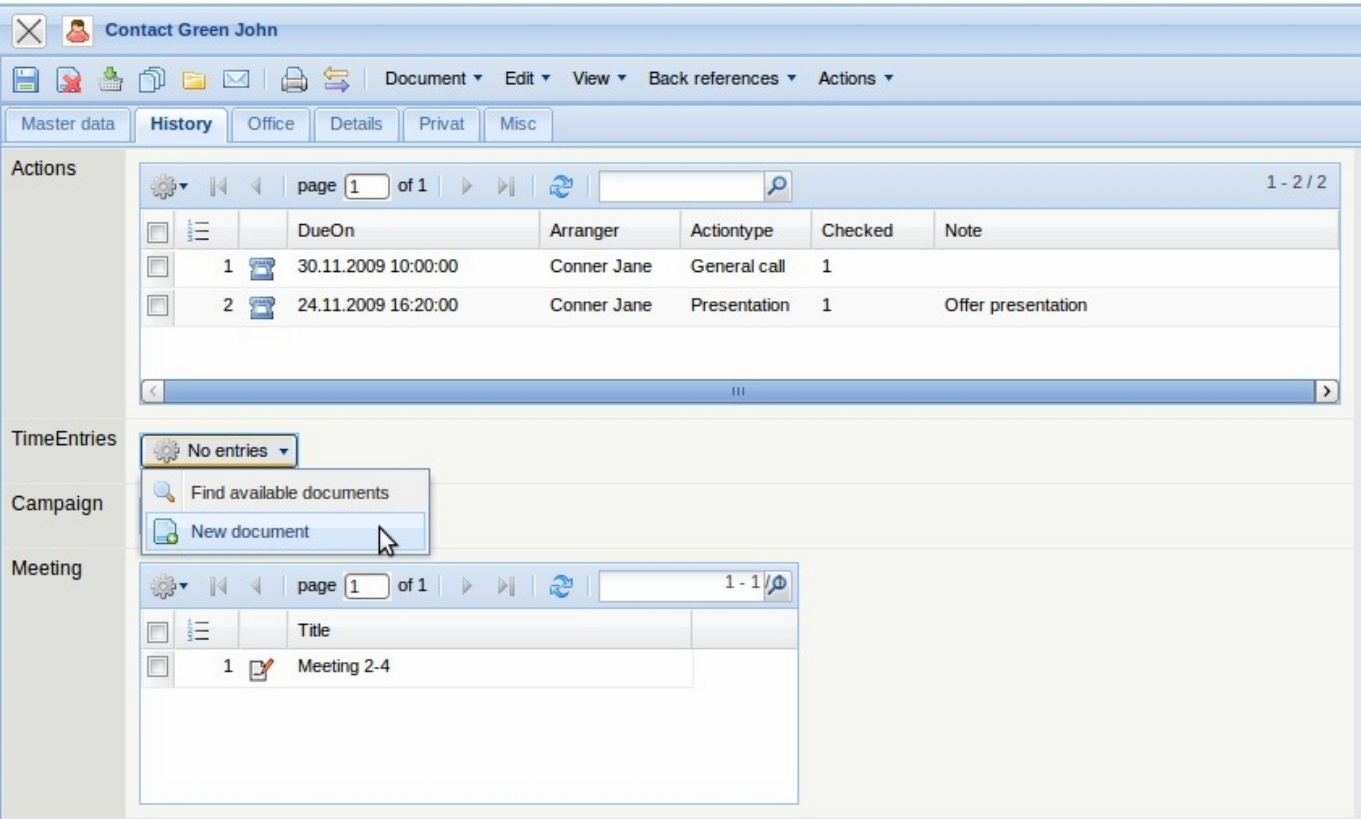
.. using the appropriate link.



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

Name

Category Private ☐

Timespan From ▾ To ▾

Inviter

Attendees Employees Unit

SendInventions

Agenda

Time entry Workshop 24.11.2009 17:00:00

Document Edit View Back references Actions

Main Invitations **Project**

Contact     

Project       

Job     

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

Time entry Workshop 24.11.2009 17:00:00

Document Edit View Back references Actions

Main Invitations Project

Entry ID 16

Name Workshop

Category Intern Private ☐

Timespan From 24.11.2009 17:00:00 To 24.11.2009 19:00:00

Inviter Conner Jane

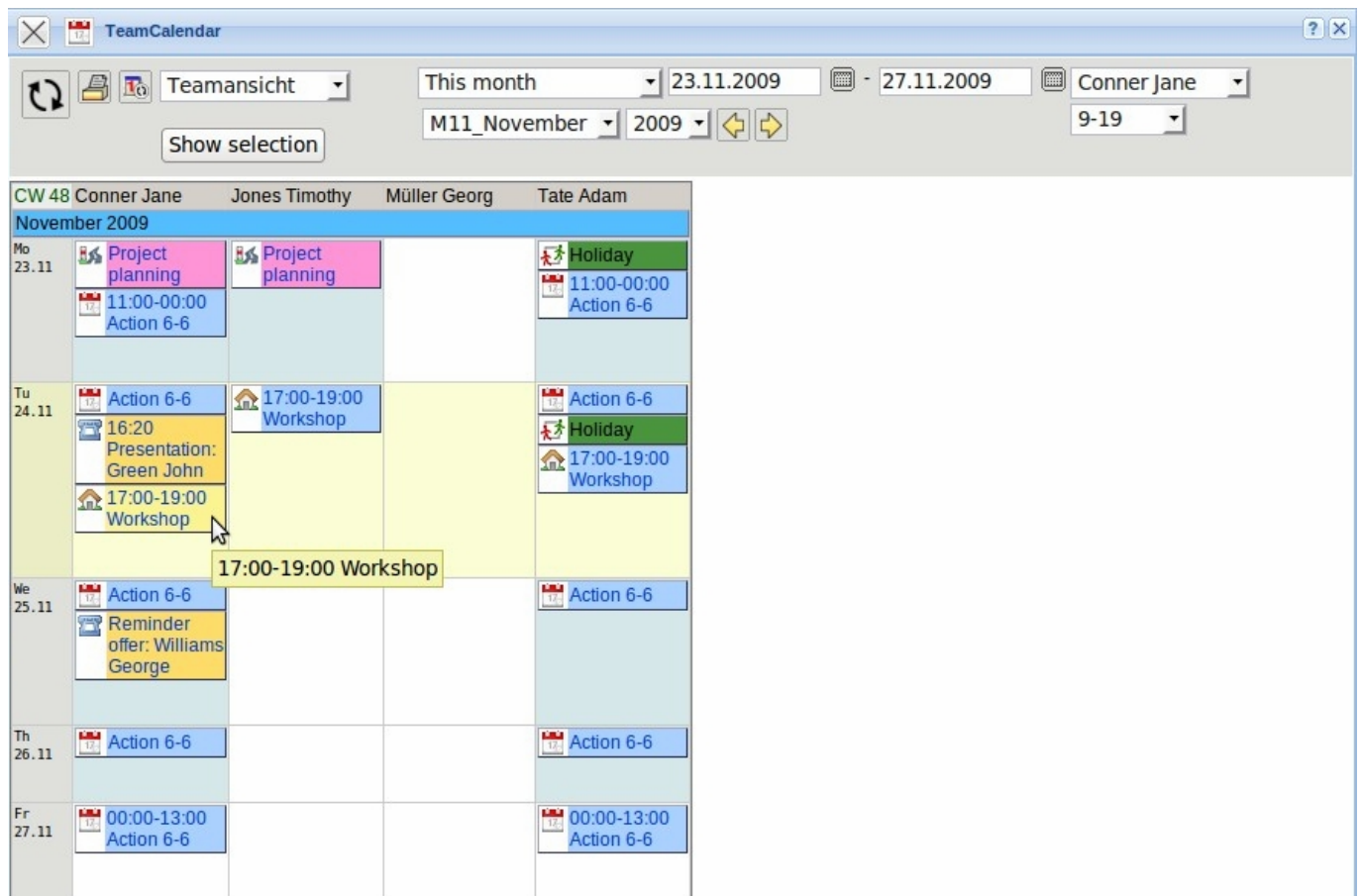
Attendees Employees Unit

SendInvitations

☐ Jones Timothy
☐ Tate Adam
☐ Conner Jane

Agenda

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 ...

Neue Auswertung

Kontaktauswertung



Neue Auswertung

... and a chart ...

 Kontaktauswertung

**Erzeugen einer Auswertung**

☒ Eingabedaten

☐ Parameter

☐ Format

☐ Ergebnisse

1. Name: Wenn Sie die Kriterien der Auswertung speichern möchten, geben Sie einen Namen an

Name

Bezeichnung

Auswertung 

2. Eingabedaten: Stellen Sie die Dokumente zusammen, für welche die Auswertung erzeugt werden soll. Benutzen Sie dazu (ggf. mehrfach) diese Suchmaschine

Profisuche 

Schnellsuche Kategorie 

Eingabedaten

3. Hauptparameter: Stellen Sie hier die wichtigsten Parameter ein:

Auswertungszeitraum 

Start 

Ende 

with all actions for !!!! in 2009 ...

Kontaktauswertung

Erzeugen einer Auswertung

Eingabedaten **Parameter** **Format** **Ergebnisse**

1. Name: Wenn Sie die Kriterien der Auswertung speichern möchten, geben Sie einen Namen an

Name:

Bezeichnung:

Auswertung: 

2. Eingabedaten: Stellen Sie die Dokumente zusammen, für welche die Auswertung erzeugt werden soll. Benutzen Sie dazu (ggf. mehrfach) diese Suchmaschine

Profisuche: 

Schnellsuche: Kategorie: 

Eingabedaten



☐  ^[1] [Kontakt Information Desire Software GmbH](#)

3. Hauptparameter: Stellen Sie hier die wichtigsten Parameter ein:

Auswertungszeitraum: 

Start:  

Ende:  

... are generated.

Kontaktauswertung									
Datum	Mitarbeiter	Kunde	Ansprechpartner	Telefon	Aktion	Projekt	Bemerkung	Abgeschlossen	Anlagedatum
17.05.2004 12:00:00	Müller Julia	Information Desire Software GmbH	Peter Schaub	0 61 31 / 627 68 - 10	Wiedervorlage		Nachfragen wg. Informationsmaterial; Präsentation anbieten	Nein	17.05.2004
12.05.2004 02:00:00	Schröder Sandra	Information Desire Software GmbH	Peter Schaub	0 61 31 / 627 68 - 10	Informationsmaterial		Produktbeschreibung für Produkt B per Email versendet	Ja	12.05.2004
12.05.2004 10:00:00	Müller Julia	Information Desire Software GmbH	Peter Schaub	0 61 31 / 627 68 - 10	Anfrage		Anfrage bzgl. Produkt B via Homepage	Ja	12.05.2004

Selektion: Kontakt Information Desire Software GmbH

Beschreibung Kontaktauswertung
 Start: 01.01.2004 00:00:00
 Ende: 31.12.2004 23:59:59
 Generiert am: 17.05.2004 18:35:18

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

Im Beispiel wird die Abfrage "Offene Aktionen [Ma, Dat]" verwendet. Diese Abfrage listet nach einigen

Eingaben ...

... alle Aktionen auf, die nicht abgeschlossen sind und sortiert diese nach dem Datum absteigend.

Die Ergebnisse der Abfrage werden in einen Report "Action" dargestellt. Dieser Report listet für die Aktionen ausgewählte Kontaktdaten auf.

Action								
Aktionen								
#	Aktion	Datum	Kontakt	Ansprechpartner	Telefon	Email-Adresse	To-Do	Bemerkung
1	1.2-1	28.05.2004 00:00:00	CONSULT GmbH	Peter Sander	061 31 / 73 13		Terminvereinbarung	Schaub Peter Termin für PM-Schulung
2	2.1-3	23.05.2004 00:00:00	Jökler Software AG	Helga Jökler	061 31 / 73 12		Wiedervorlage	Schaub Peter Nachfragen wg. Bestellung
3	2.1-2	14.05.2004 00:00:00	Jökler Software AG	Helga Jökler	061 31 / 73 12		Informationsmaterial	Schaub Peter Zwischenergebnisse schicken

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