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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 columns 'Name' and 'Date'. A dropdown menu is open for 'No entries', showing options like 'Find available documents' and 'New document'. Below the table, a single entry is listed: 'Action 6-6' dated '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 form contains the following fields and values:

- Action:** 5.2-1
- Customer:** (empty dropdown)
- Projectdescription:** (empty dropdown)
- DueOn:** 24.11.2009 00:00:00
- Actiontype:** (empty dropdown)
- Priority:** 3 - normal priority
- Arranger:** Conner Jane
- Note:** (empty text area)
- 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 Misc

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 Misc

Action 5.2-2

Customer John Green Ltd. Contact Green John

Projectdescription

DueOn 24.11.2009 15:00:00

Context menu 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.

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

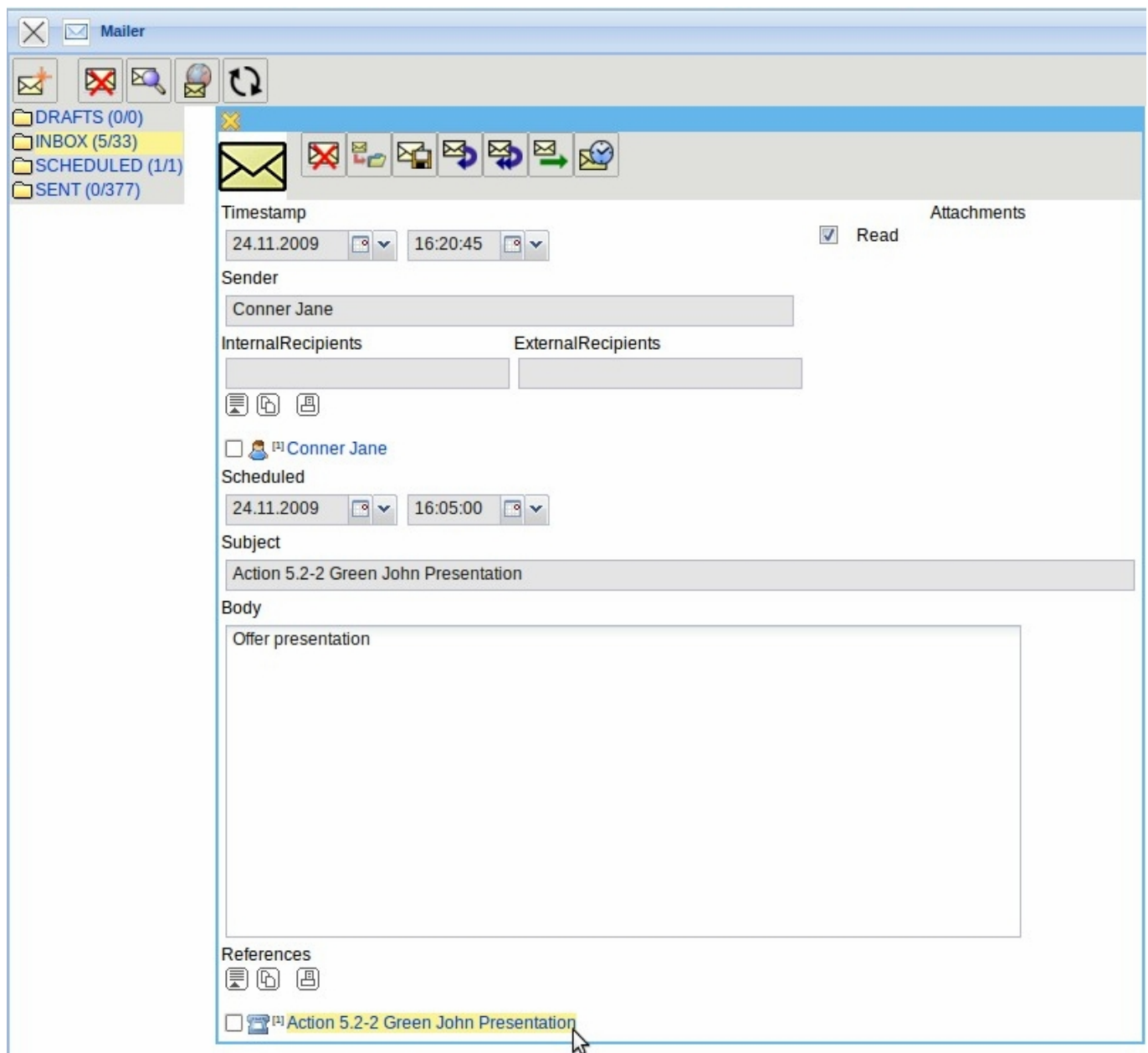
Note Offer presentation

Checked ☒

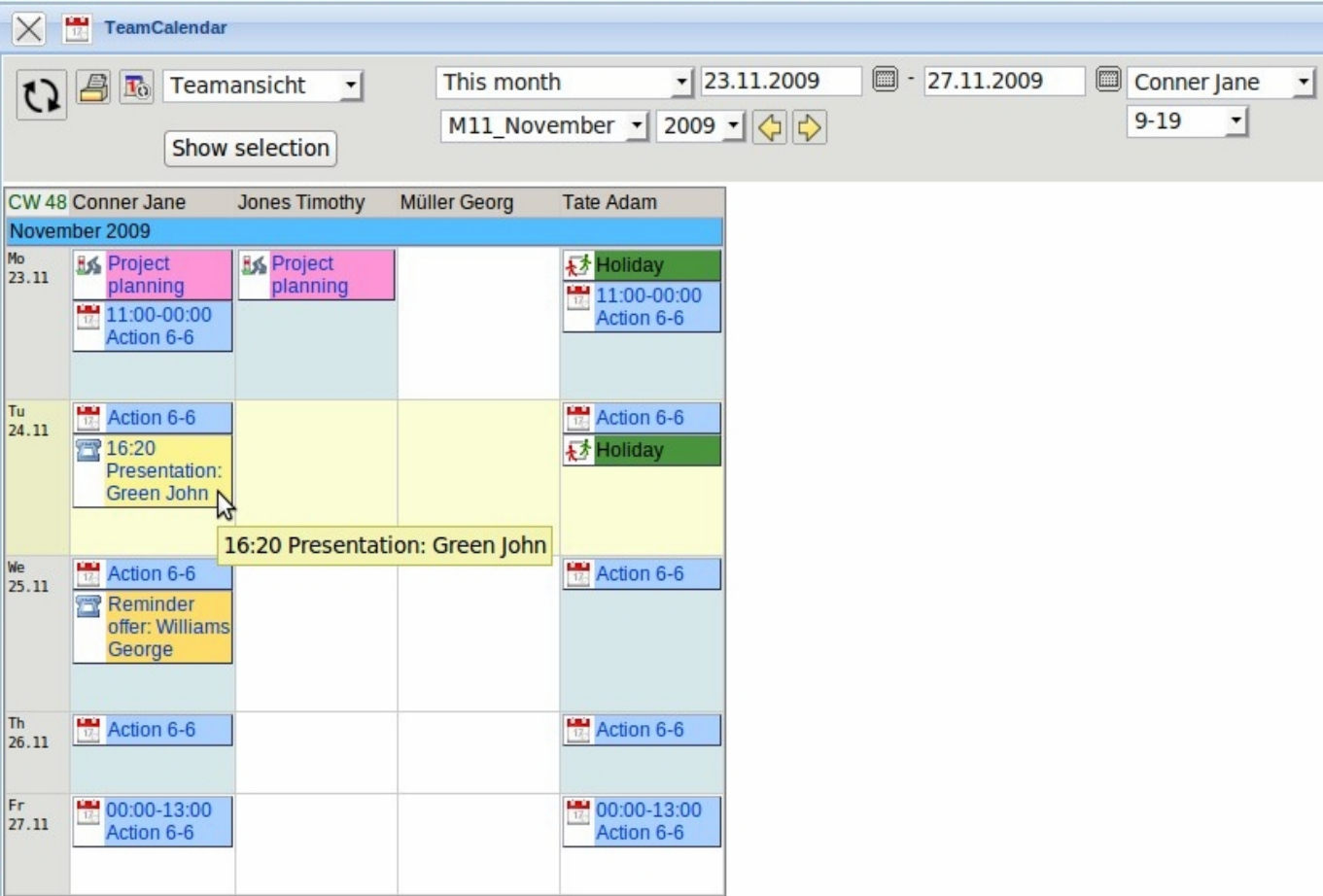
If the optional component [mailer](#) is used, the system generates automatically an e-mail message for this action on the given day ...



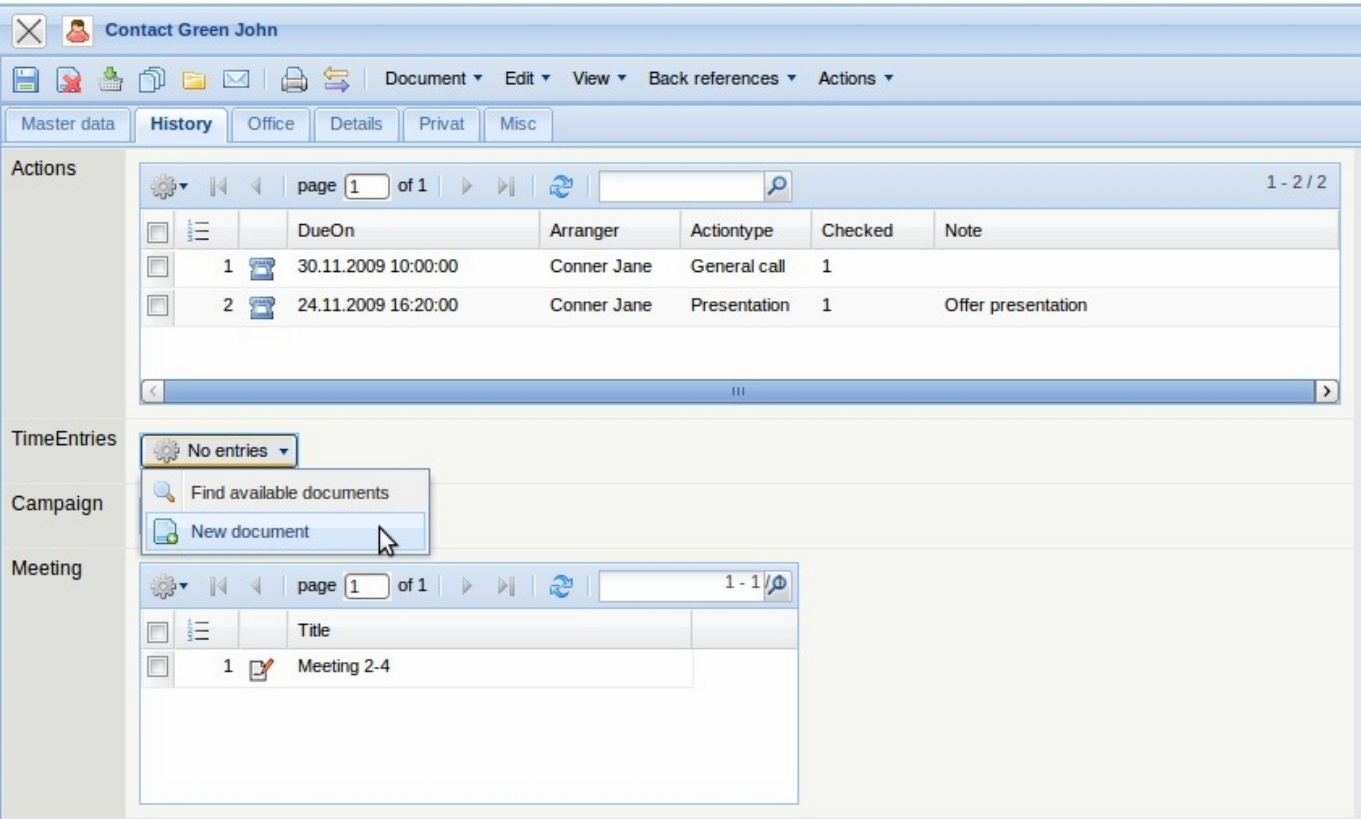
.. using the appropriate link.



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	16	
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 Green John

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

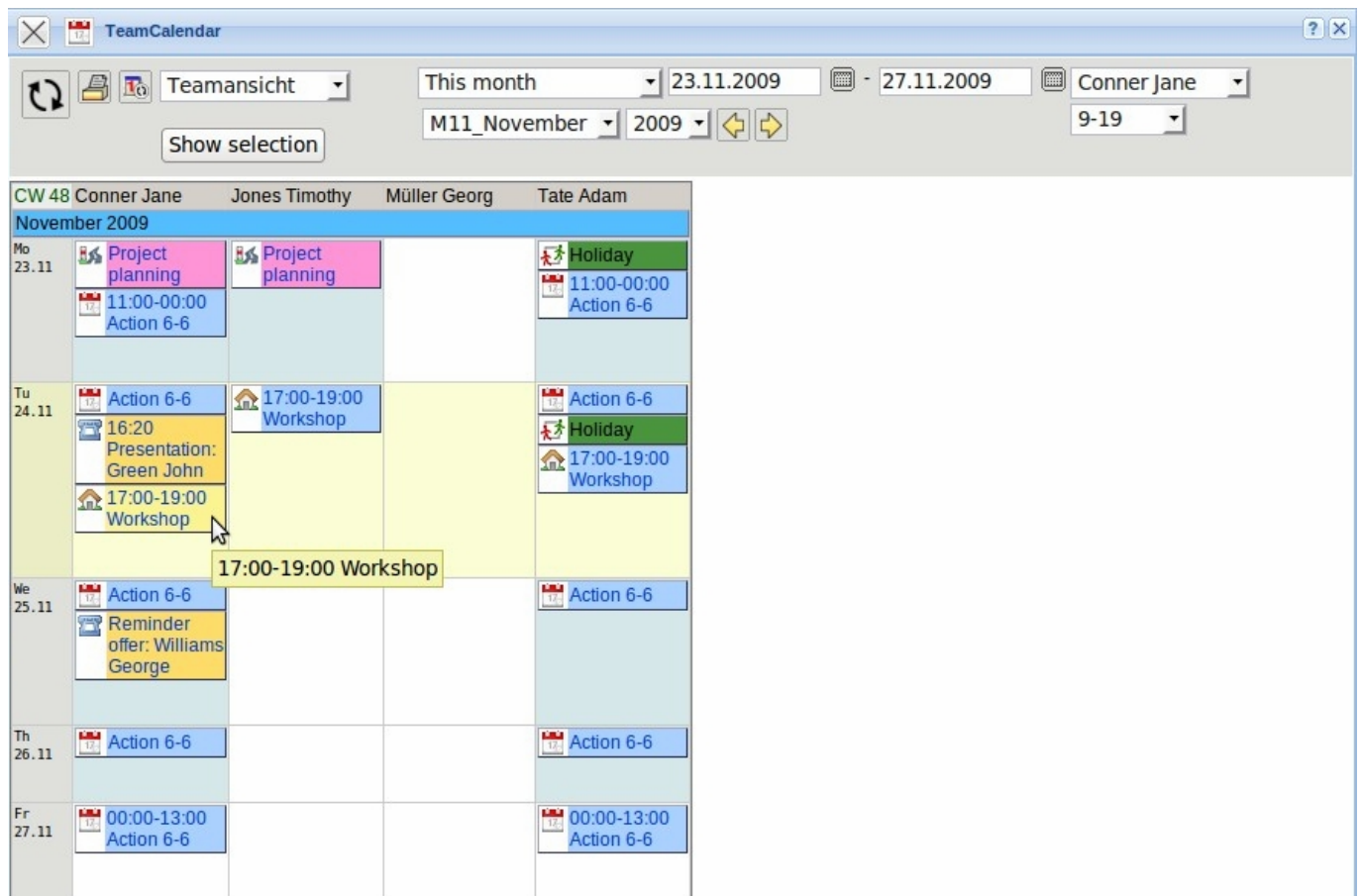
Attendees Employees Unit

SendInvitations

☐ Jones Timothy
☐ Tate Adam
☐ Conner Jane

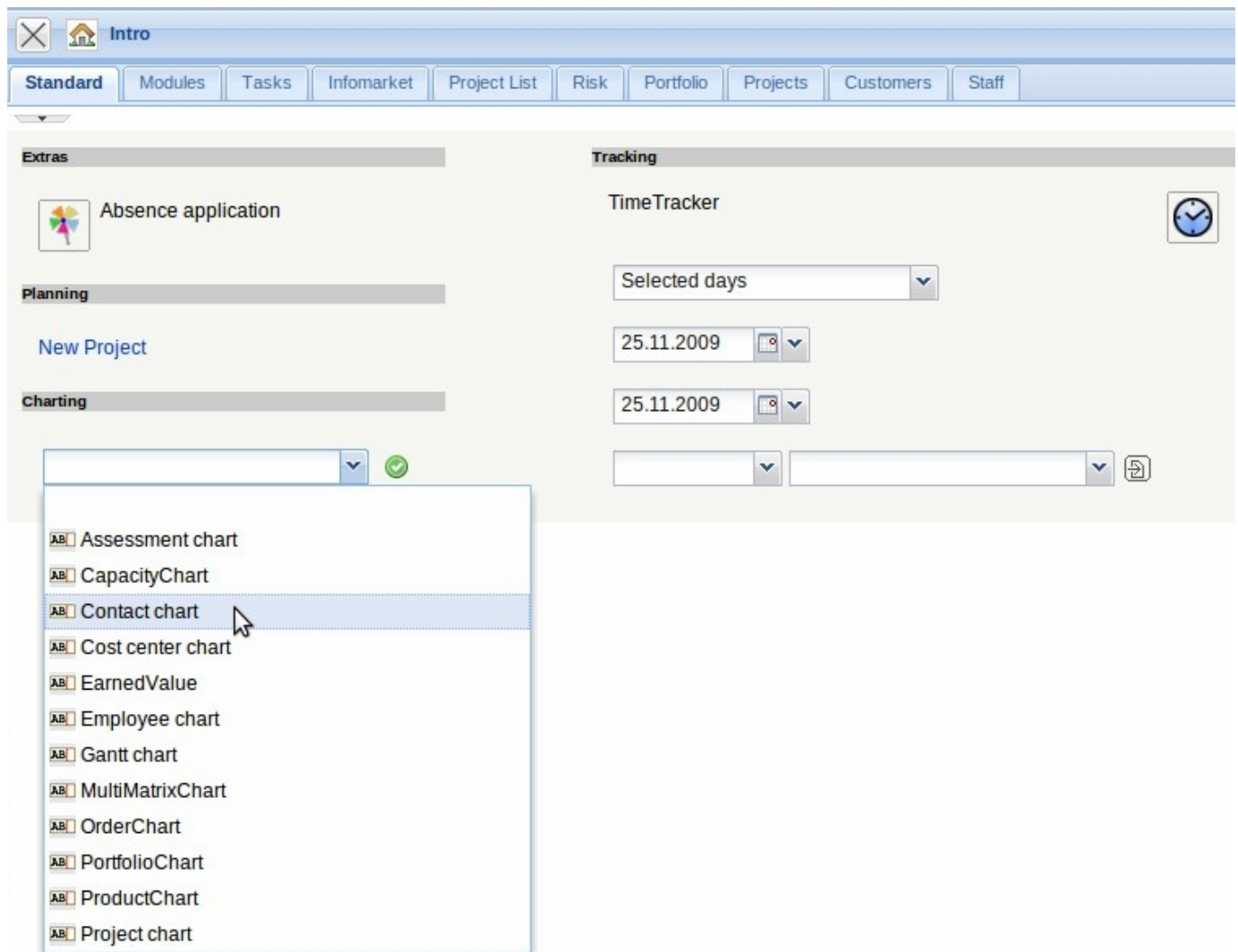
Agenda

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 ...



... and a chart ...

Contact chart

Generate chart

Document Edit View

InputDataParametersFormatResults

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

Name

2

Description

Contact chart

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 for !!!! in 2009 ...

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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 of 1

	1	Contact Green John

3. Main parameters: *Please select parameters:*

Chart period

Start

End

... 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 ...

Profi-Suche

Auswahl

Name

Abfrage

Finden

Felder nachschlagen

Report

Report

Format

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... 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.

#	Aktion	Datum	Kontakt	Ansprechpartner	Telefon	Email-Adresse	To-Do	Mitarbeiter	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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