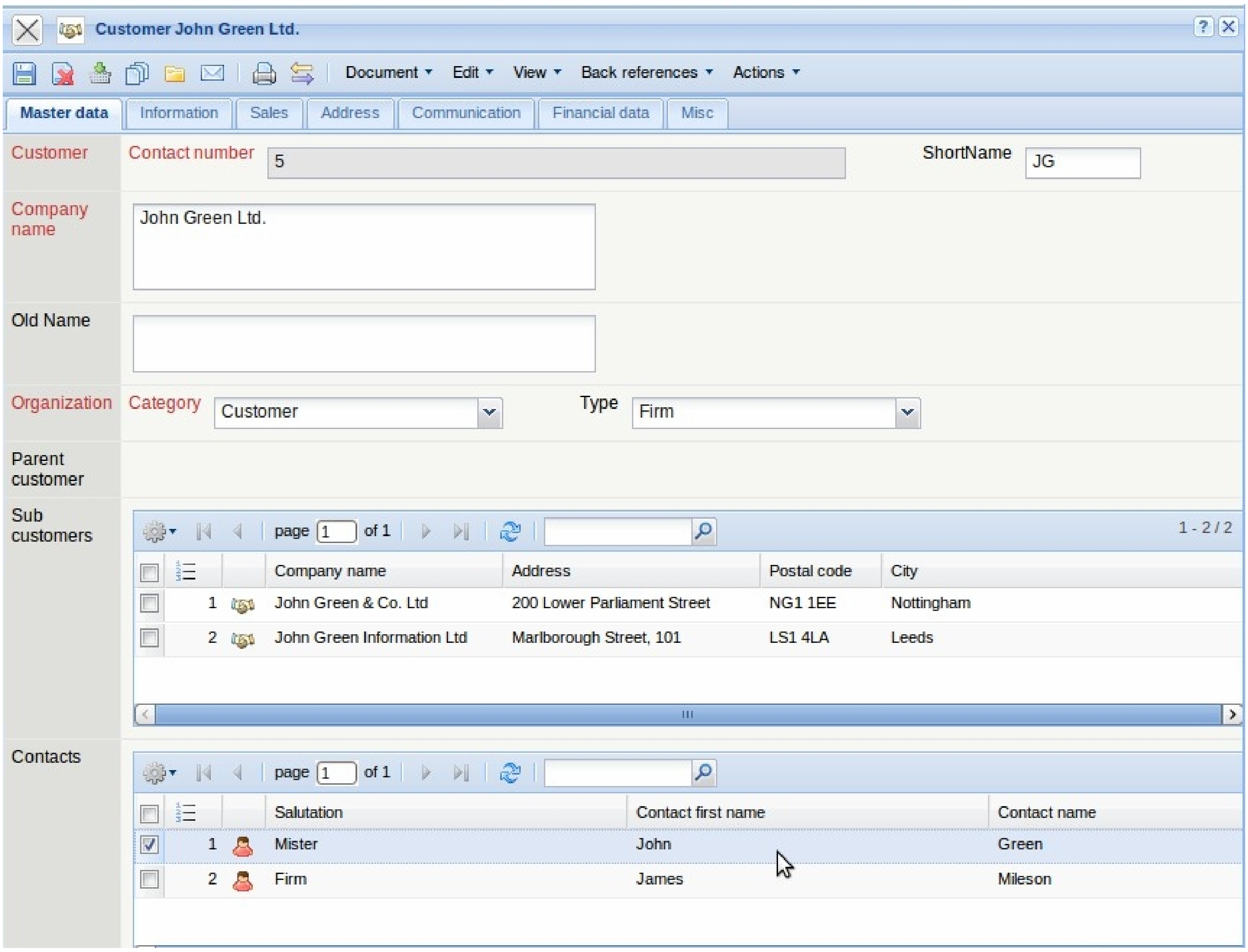
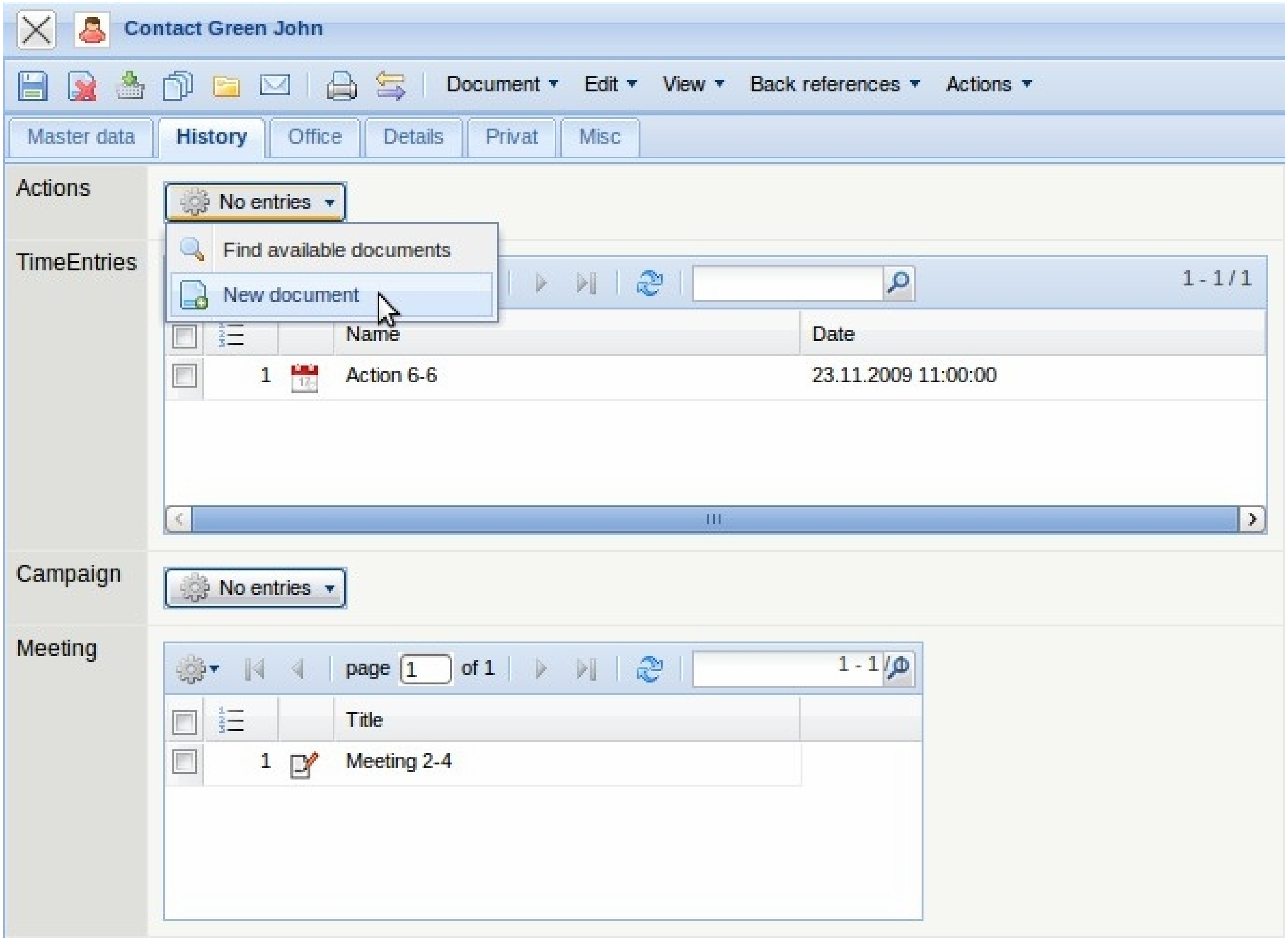
previous Home next

3.11.04 The Customer System (... continued)

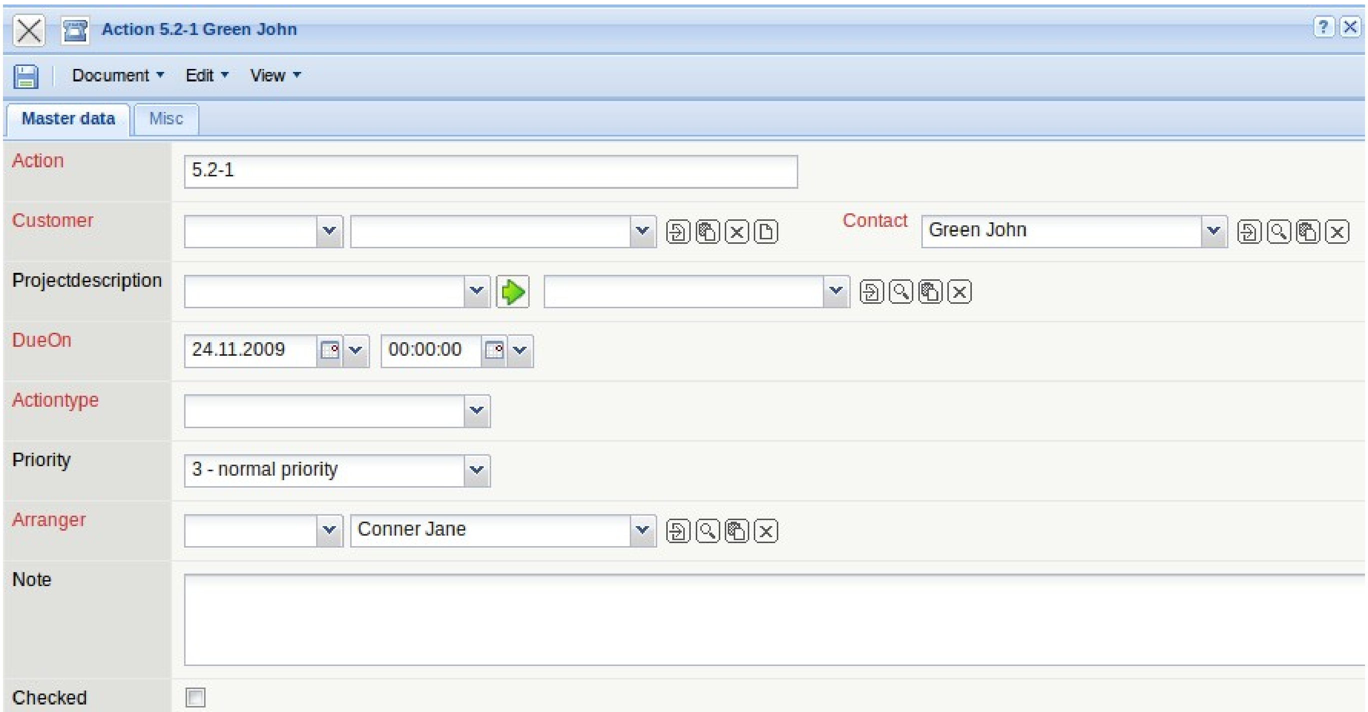
For each contact person any number of actions can be defined. Actions can, for example be requests, appointments, reminders, etc. These actions will log important events with (history) and can furthermore be used for the acquisition and public relations.



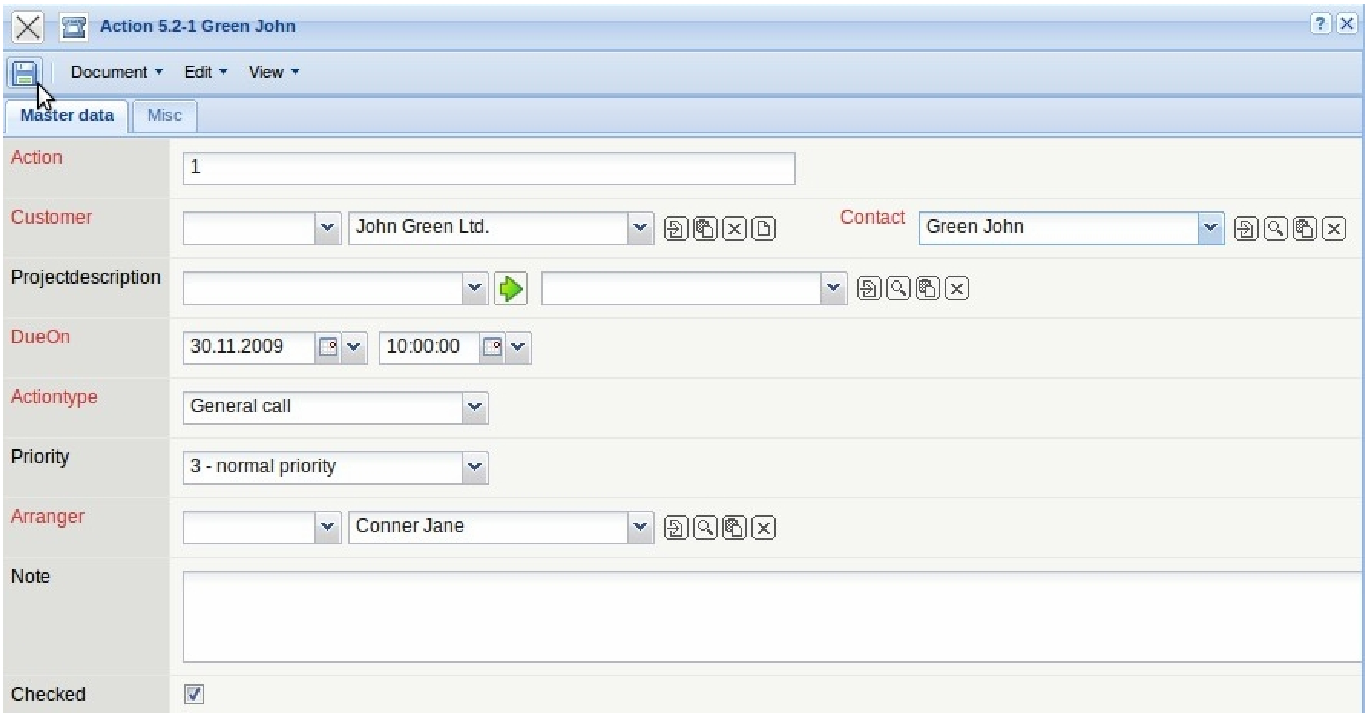
These actions are defined using the function “New document” in the document type “contact person”:



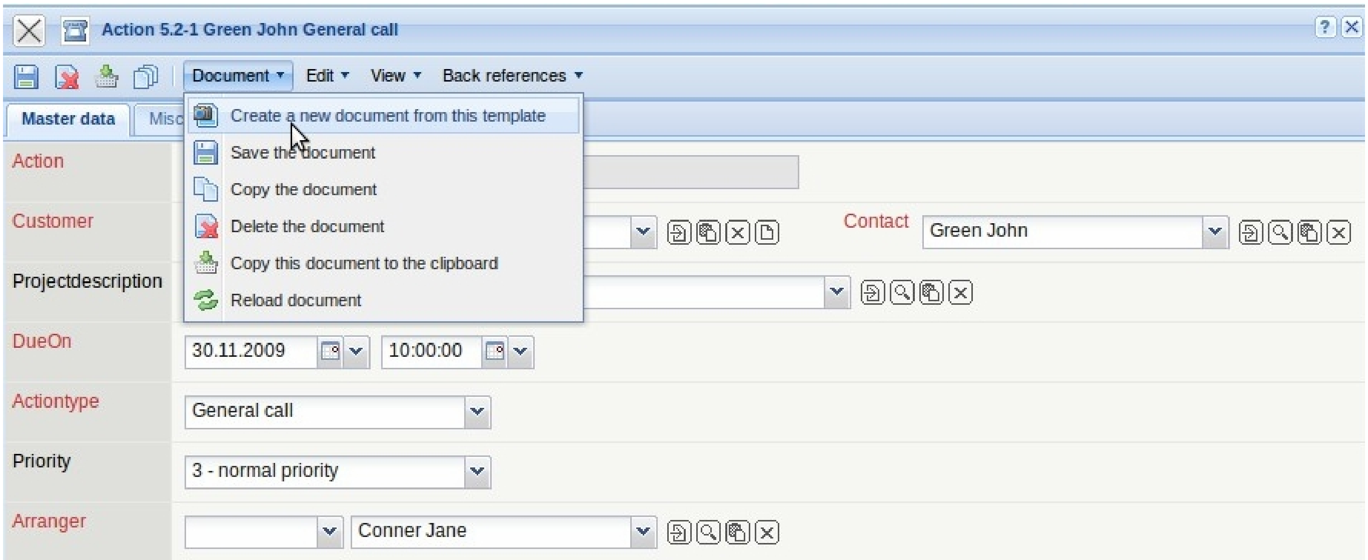
The system generates a new document with the type "action" and populates the contact person and other various values automatically.



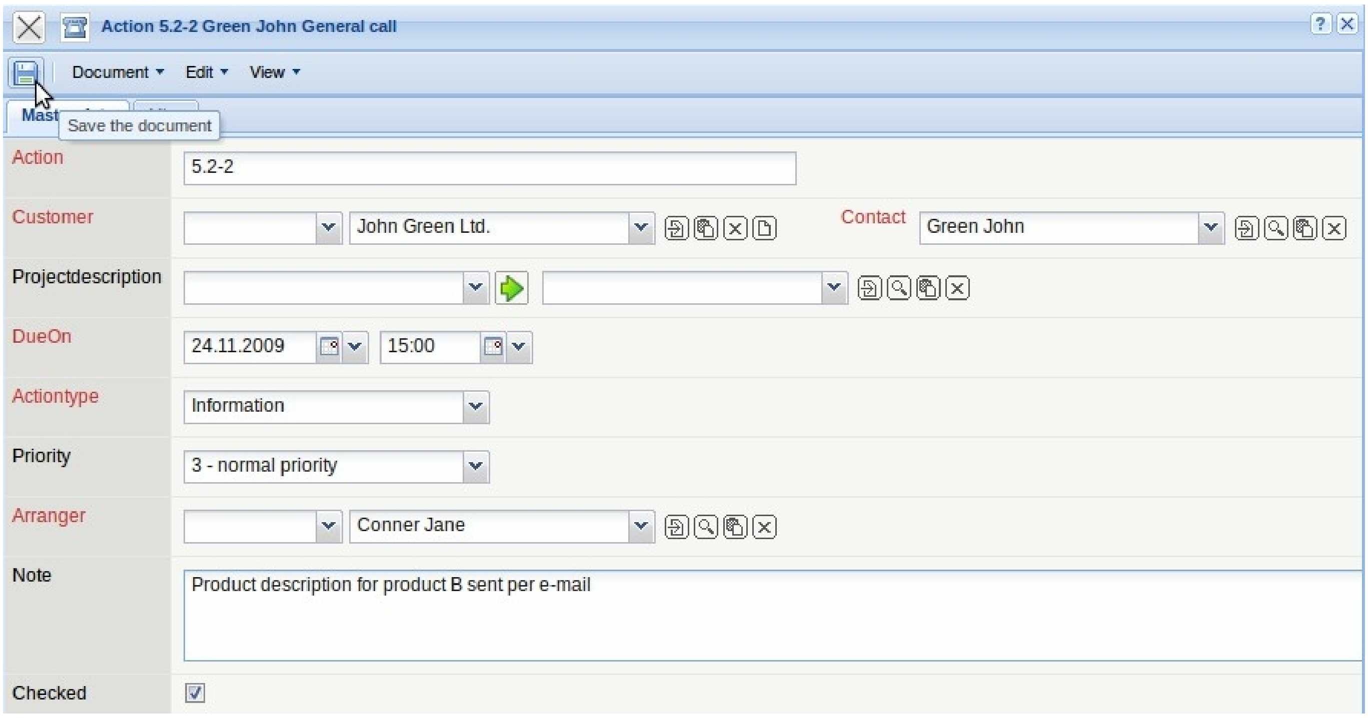
After filling out the relevant fields, the document can then be saved.



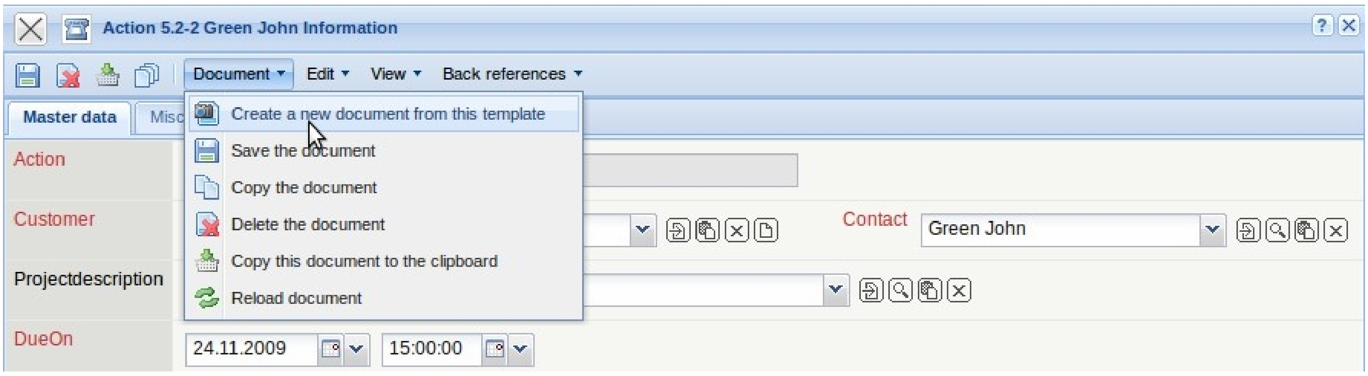
Further actions can be generated using the functionality "Create new document from this template".



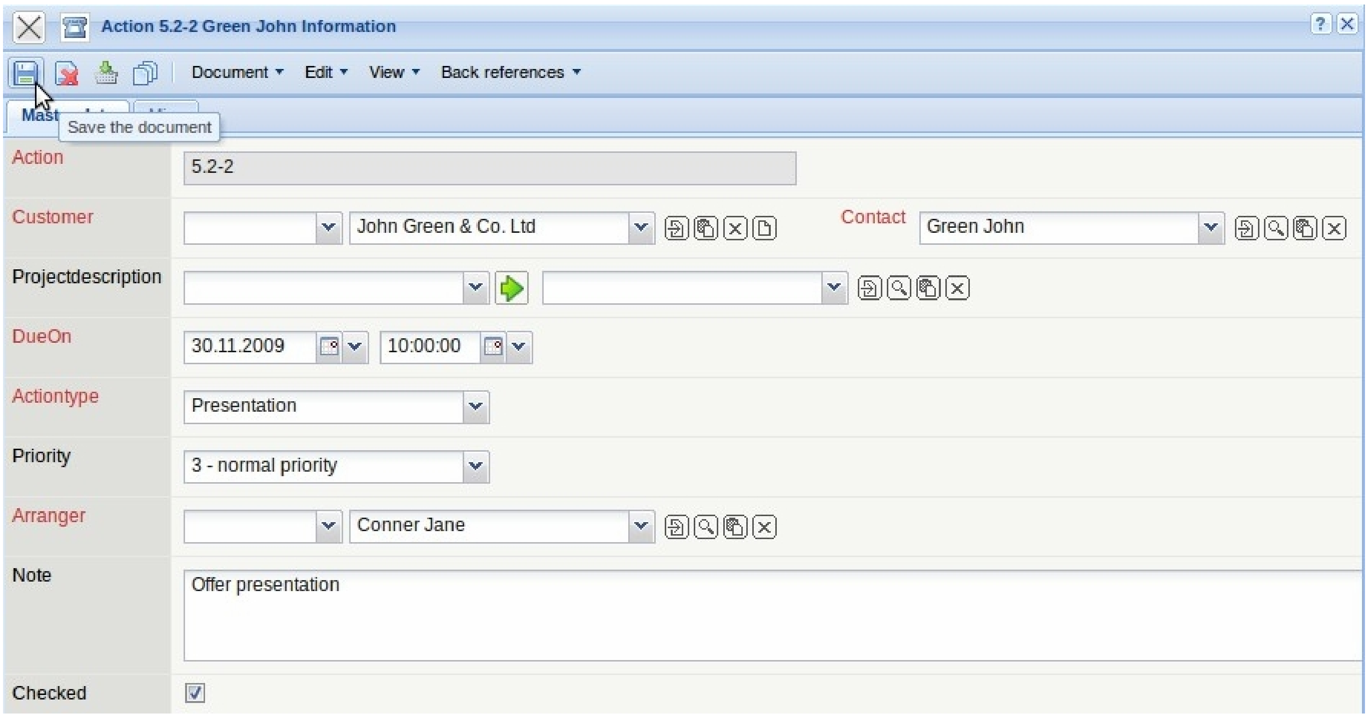
This next action is sending information material through a request. This action is marked as completed. The check box "checked" indicates a completed action. If this flag is not set, the defined action is a resubmission, which can be displayed in the contact chart.



In the next action …

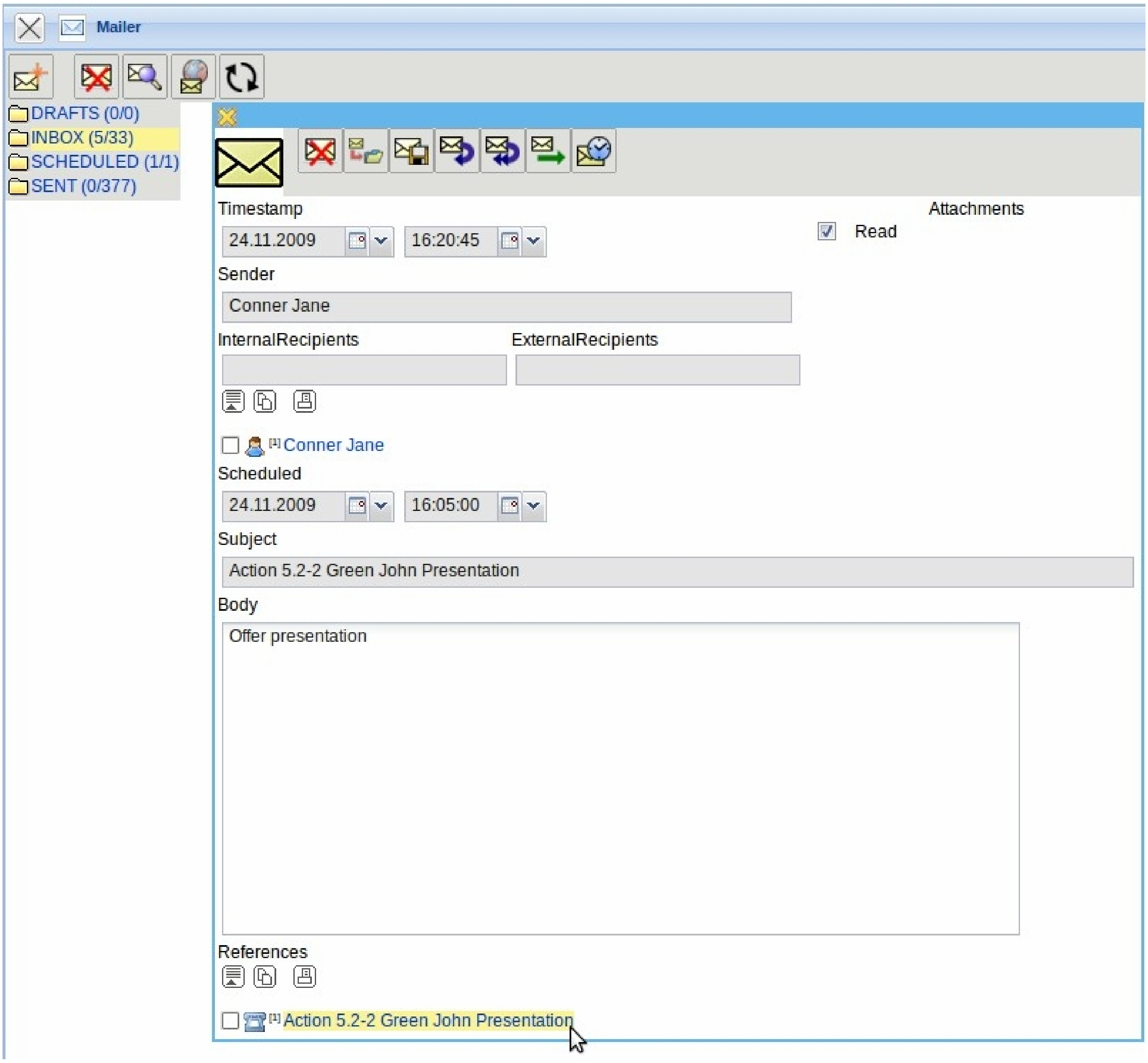


… a presentation is offered on 30.11.2009.

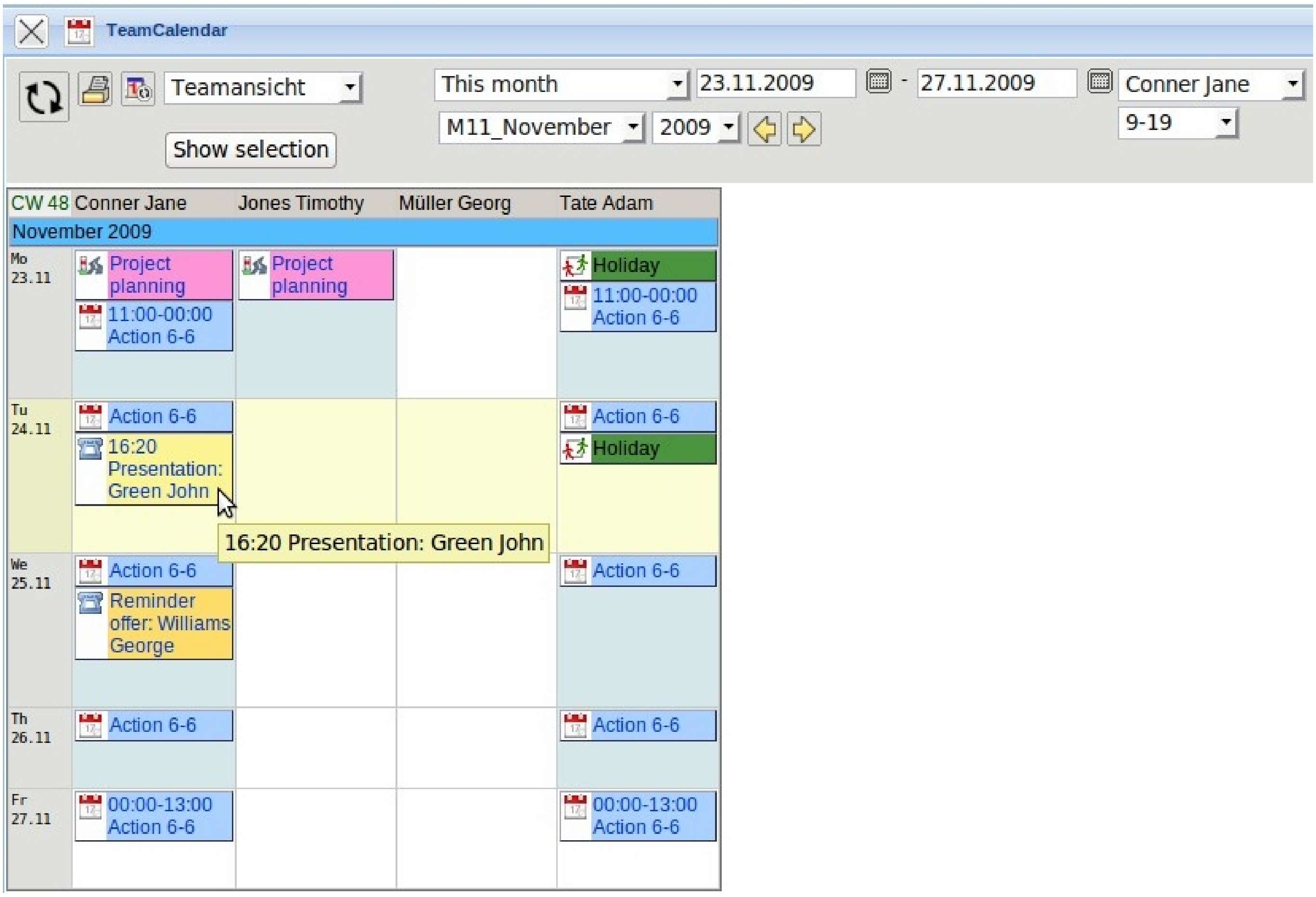


If the optional component mailer is used, the system generates automatically an e-mail message for this action on the given day ...

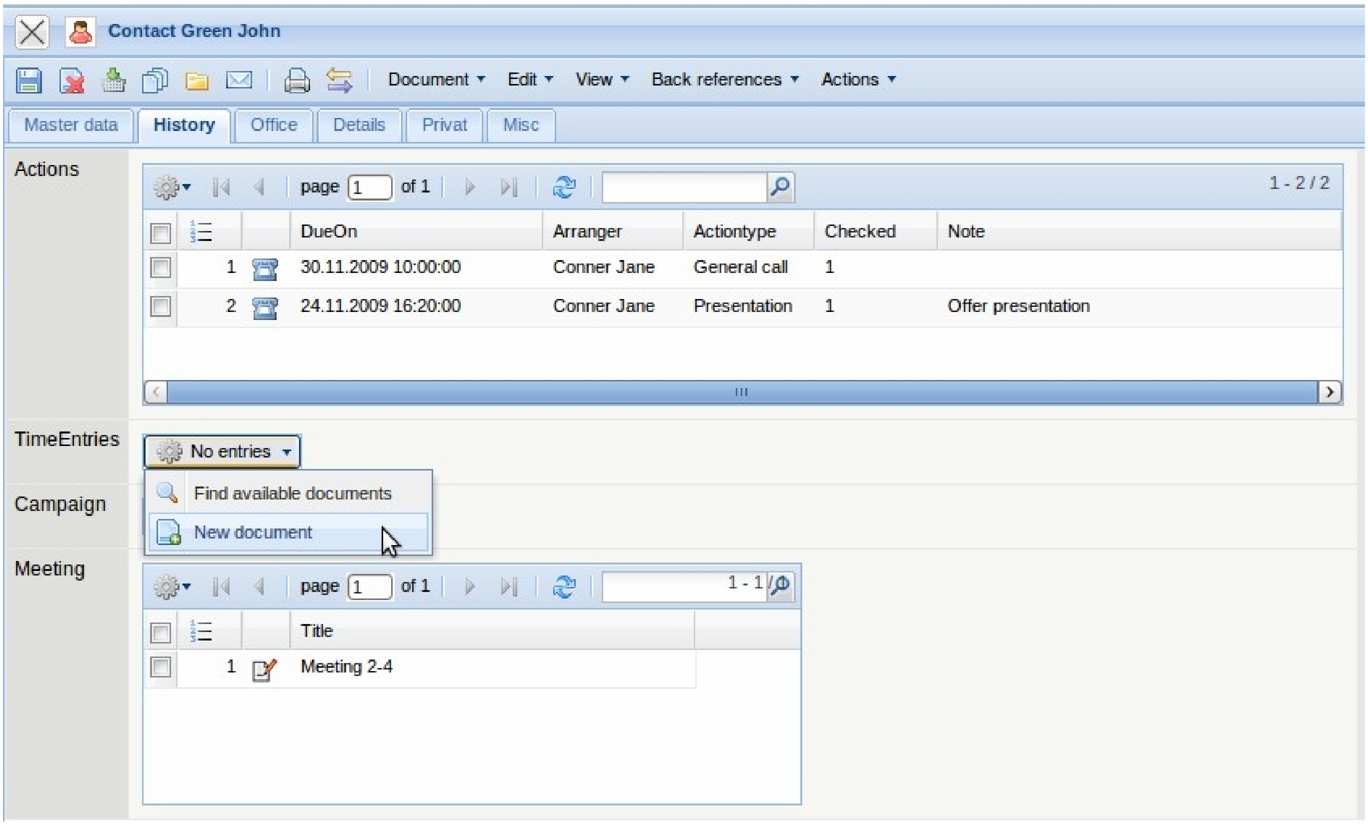
.. using the appropriate link.



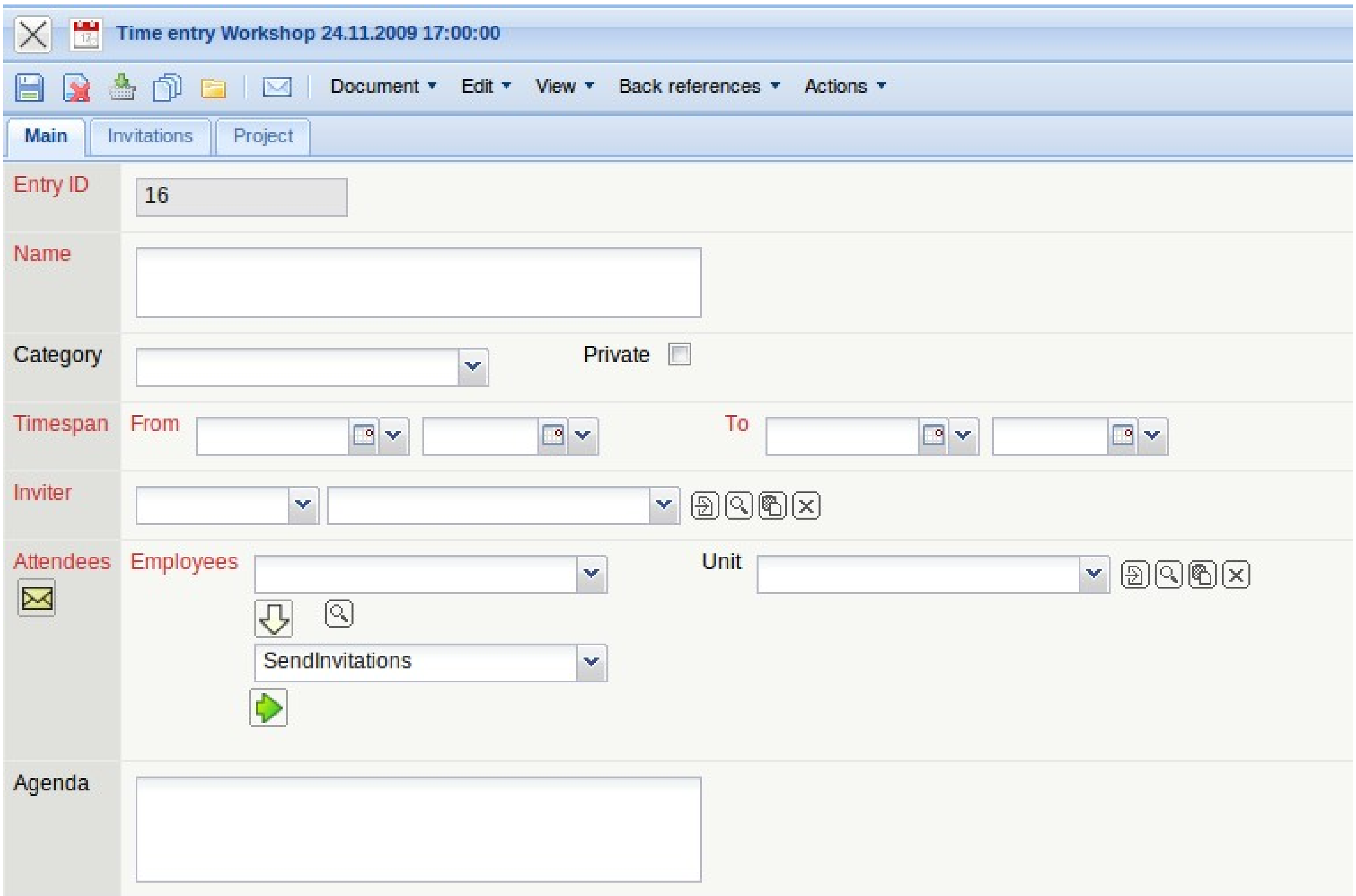
If the optional component TeamCalendar is used, this action is also displayed in the group calendar (here presention with John Green on 24.11.2009) and can be opened here.

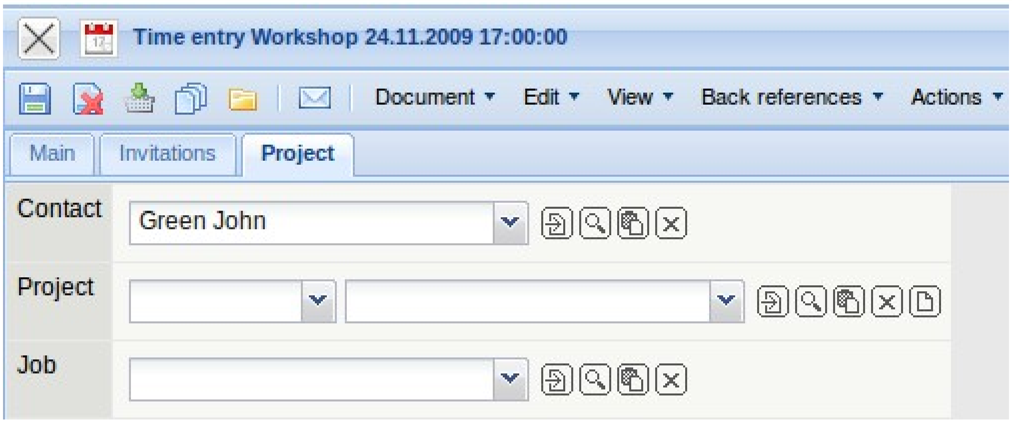


Appointments can also be defined for the contact persons here.

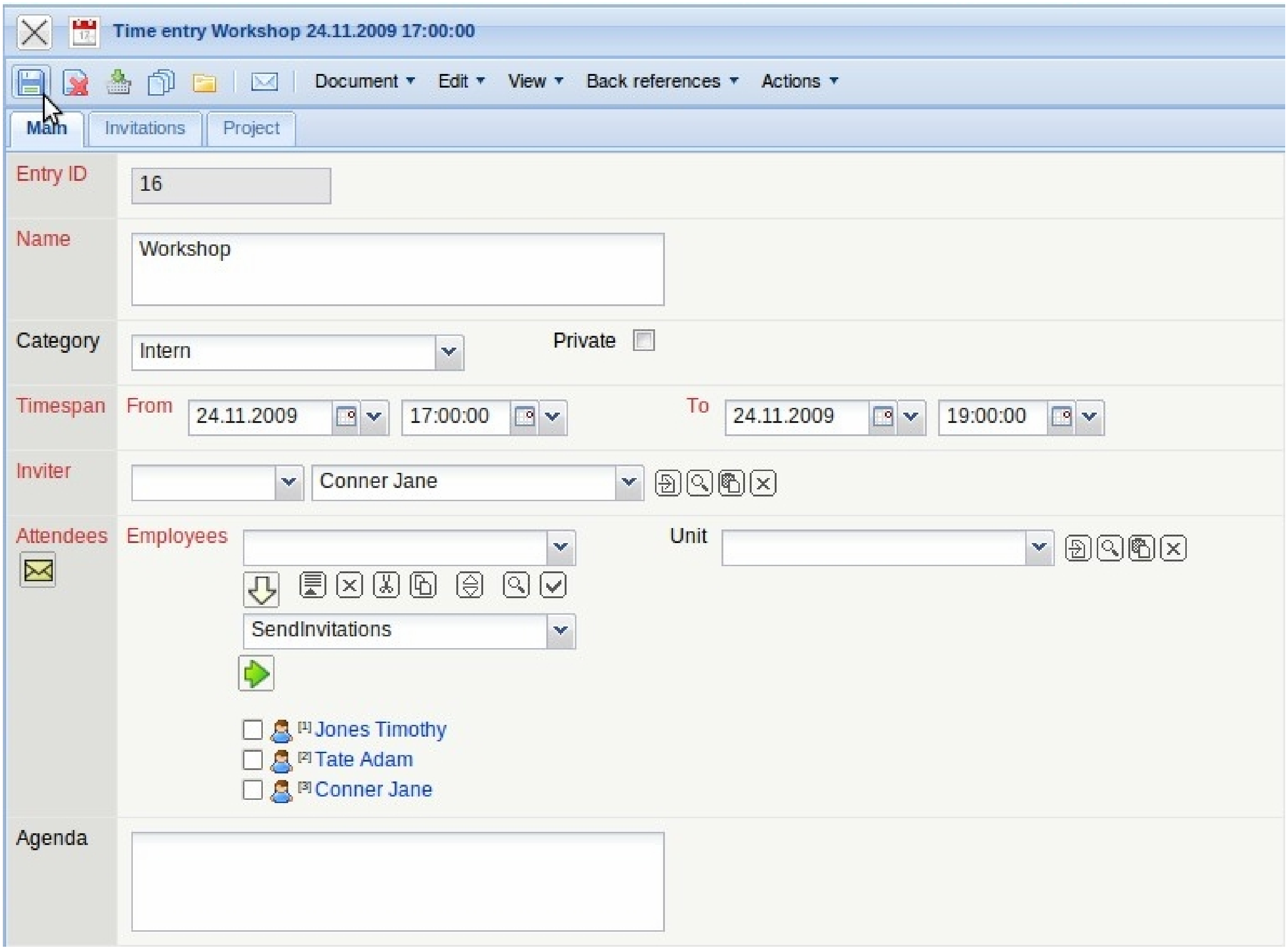


In the example, an appointment (time entry) for John Green …

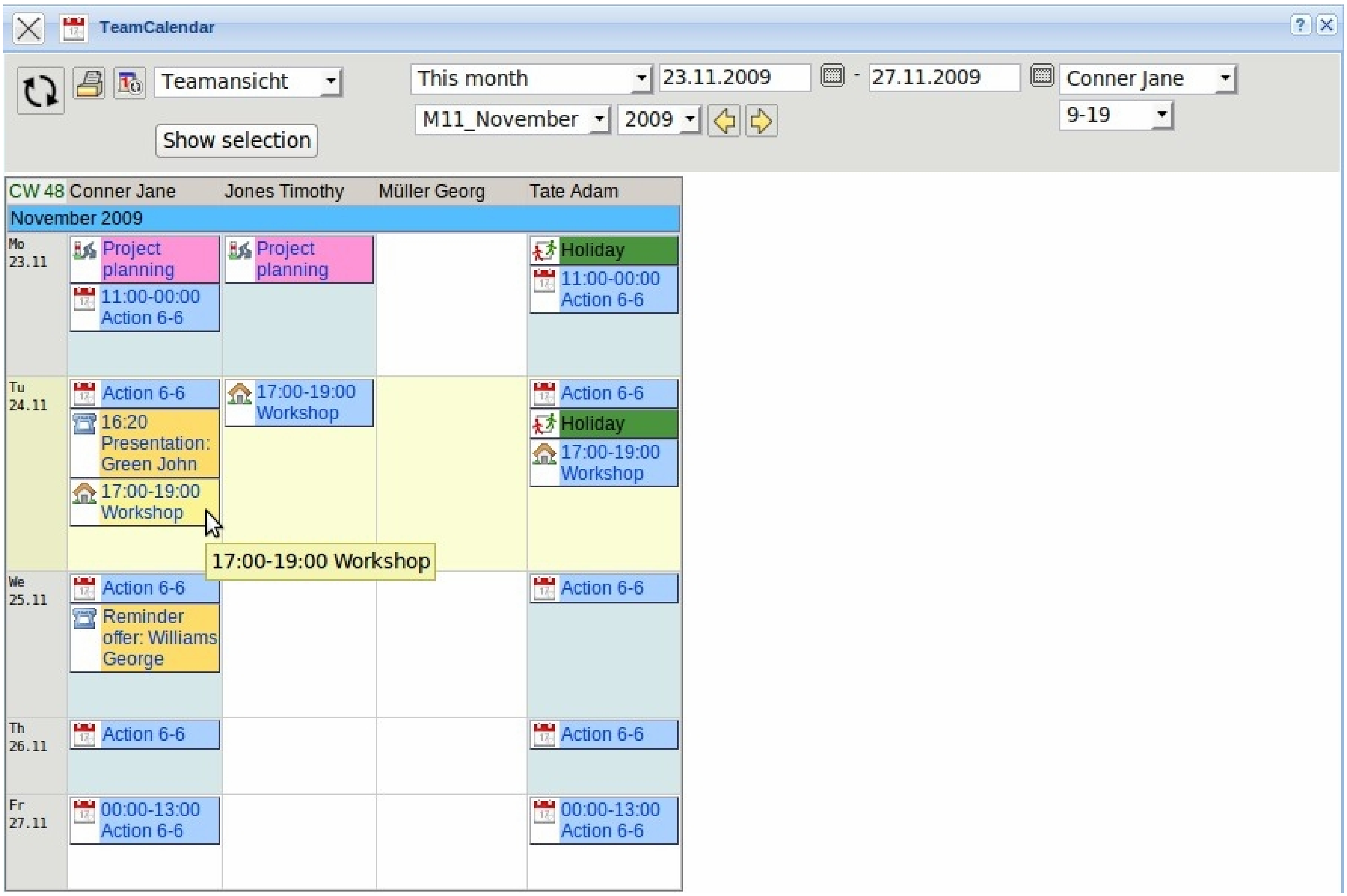




is created for 24.11.2009 from 17:00 - 19:00:

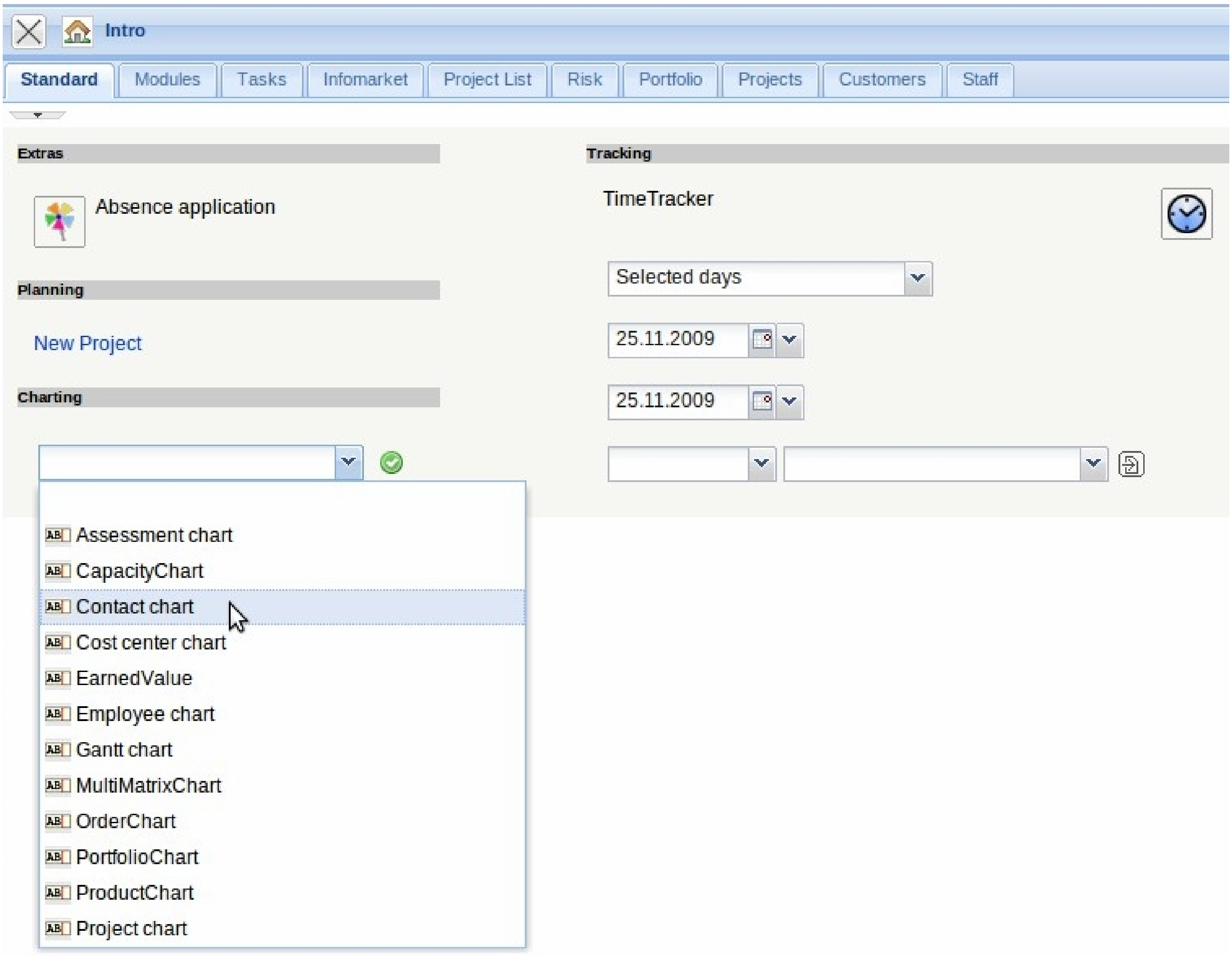


This appointment (time entry) is then transfered to the group calendar. Note: if the group calendar is not used, the appointments can be used alternatively as actions with to-do appointments or similar.

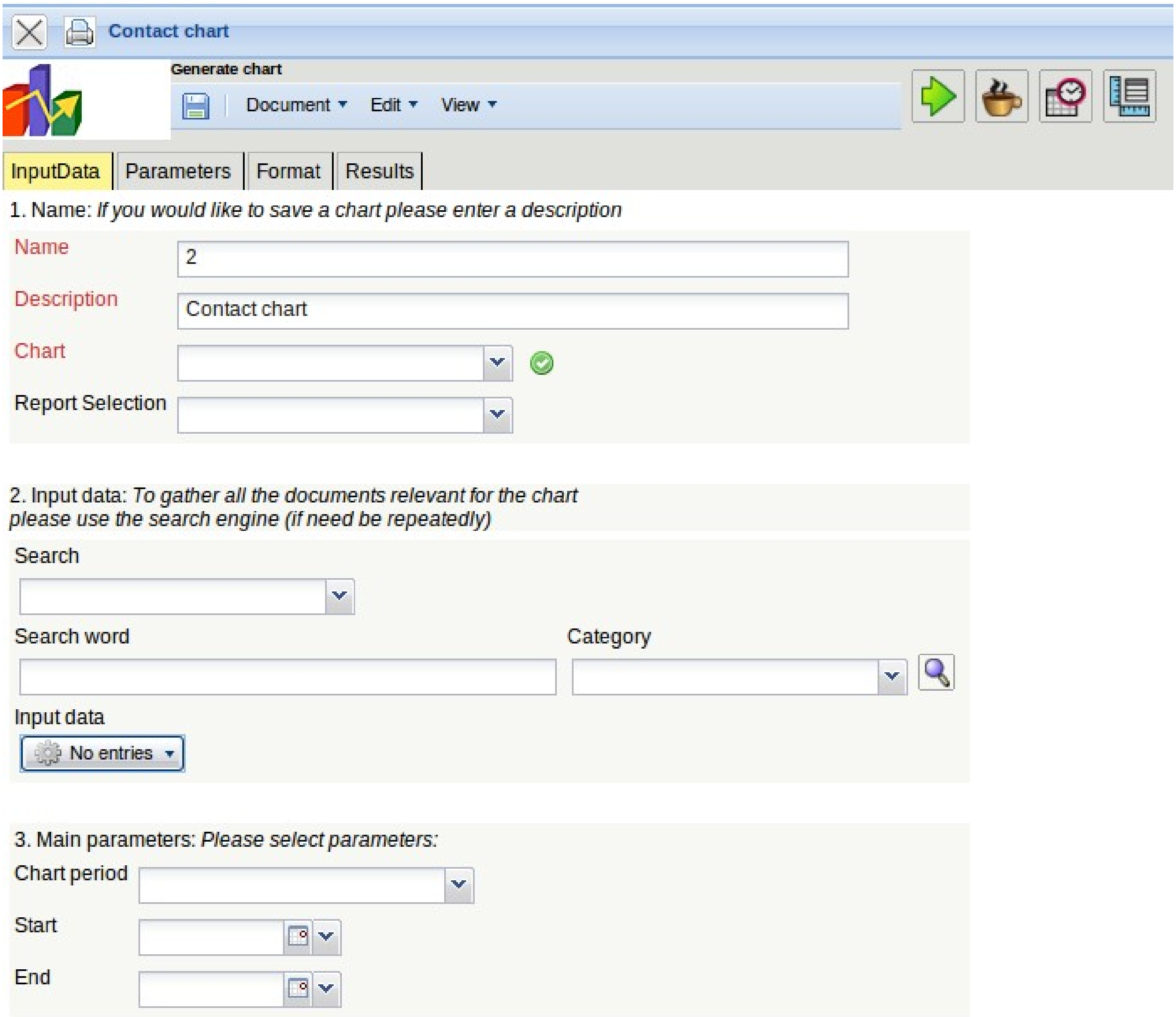


The defined actions can be evaluated in the standard charts and in the optional ReportMaker

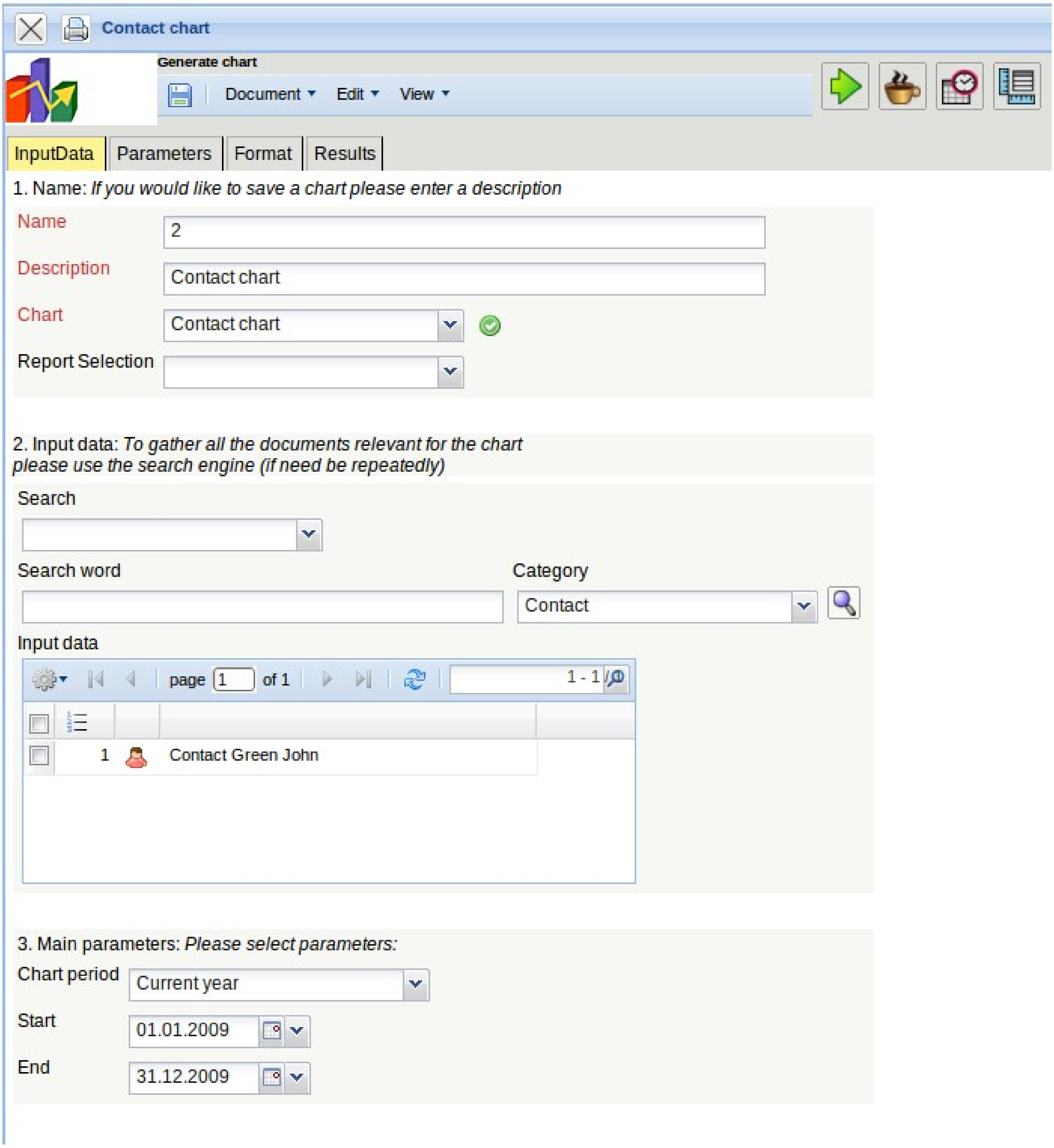
In the following example a contact chart is opened …


Intro
Standard
Modules
Tasks
Infomarket
Project List
Risk
Portfolio
Projects
Customers
Staff
Extras
Absence application
Planning
New Project
Charting
Assessment chart
CapacityChart
Contact chart
Cost center chart
EarnedValue
Employee chart
Gantt chart
MultiMatrixChart
OrderChart
PortfolioChart
ProductChart
Project chart
Tracking
TimeTracker
Selected days
25.11.2009
25.11.2009

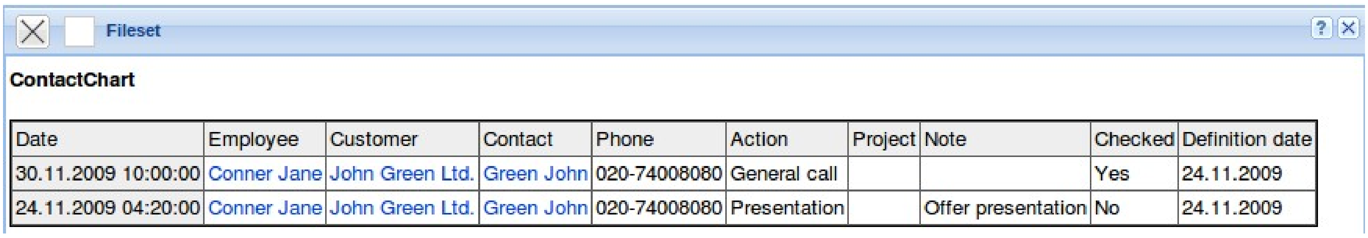
... and a chart ...



with all actions in the year 2009 …



… is generated.

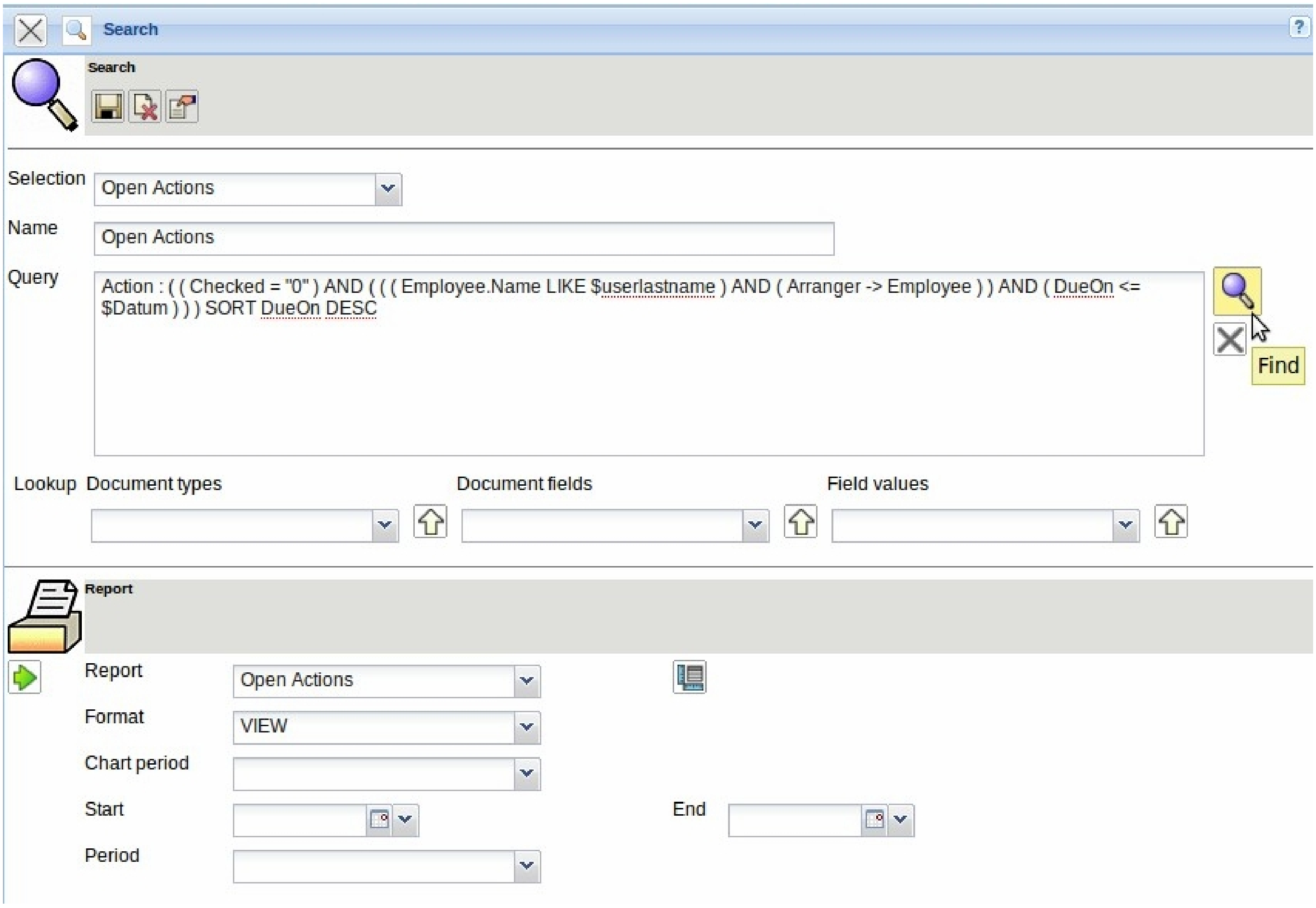


ContactChart

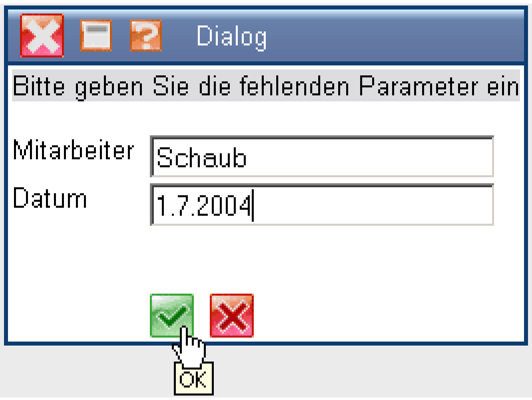
Date	Employee	Customer	Contact	Phone	Action	Project	Note	Checked	Definition date
30.11.2009 10:00:00	Conner Jane	John Green Ltd.	Green John	020-74008080	General call			Yes	24.11.2009
24.11.2009 04:20:00	Conner Jane	John Green Ltd.	Green John	020-74008080	Presentation		Offer presentation	No	24.11.2009

If the optional component ReportMaker is used, your own report in combination with the advanced search can be used.

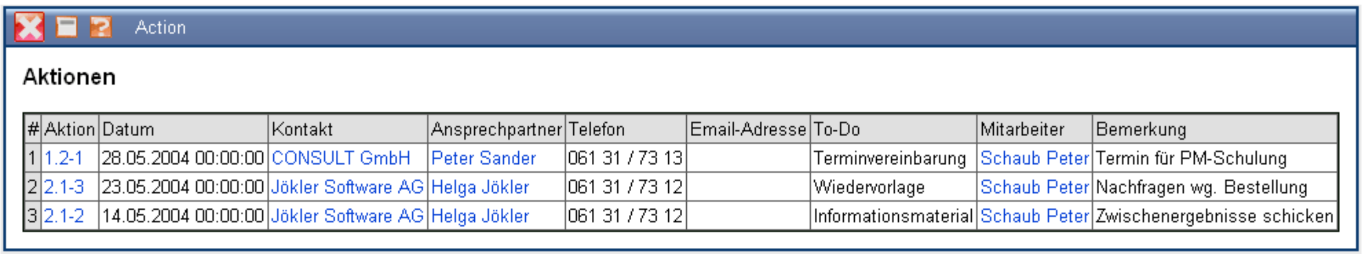
In the example, the query “All open actions” is used. This query lists all actions, which are not yet completed …



… and sorts them by the descending date.



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	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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