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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	Milesen

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

The screenshot shows the 'Contact Green John' window with the 'Actions' tab selected. A dropdown menu is open, showing options like 'Find available documents' and 'New document'. Below the menu, a table lists actions:

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

Below the table, there is a 'Campaign' section with a 'No entries' dropdown and a 'Meeting' section with a table of meetings:

	Title
1	Meeting 2-4

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 fields are populated as follows:

- 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: General call

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

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 Misc

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

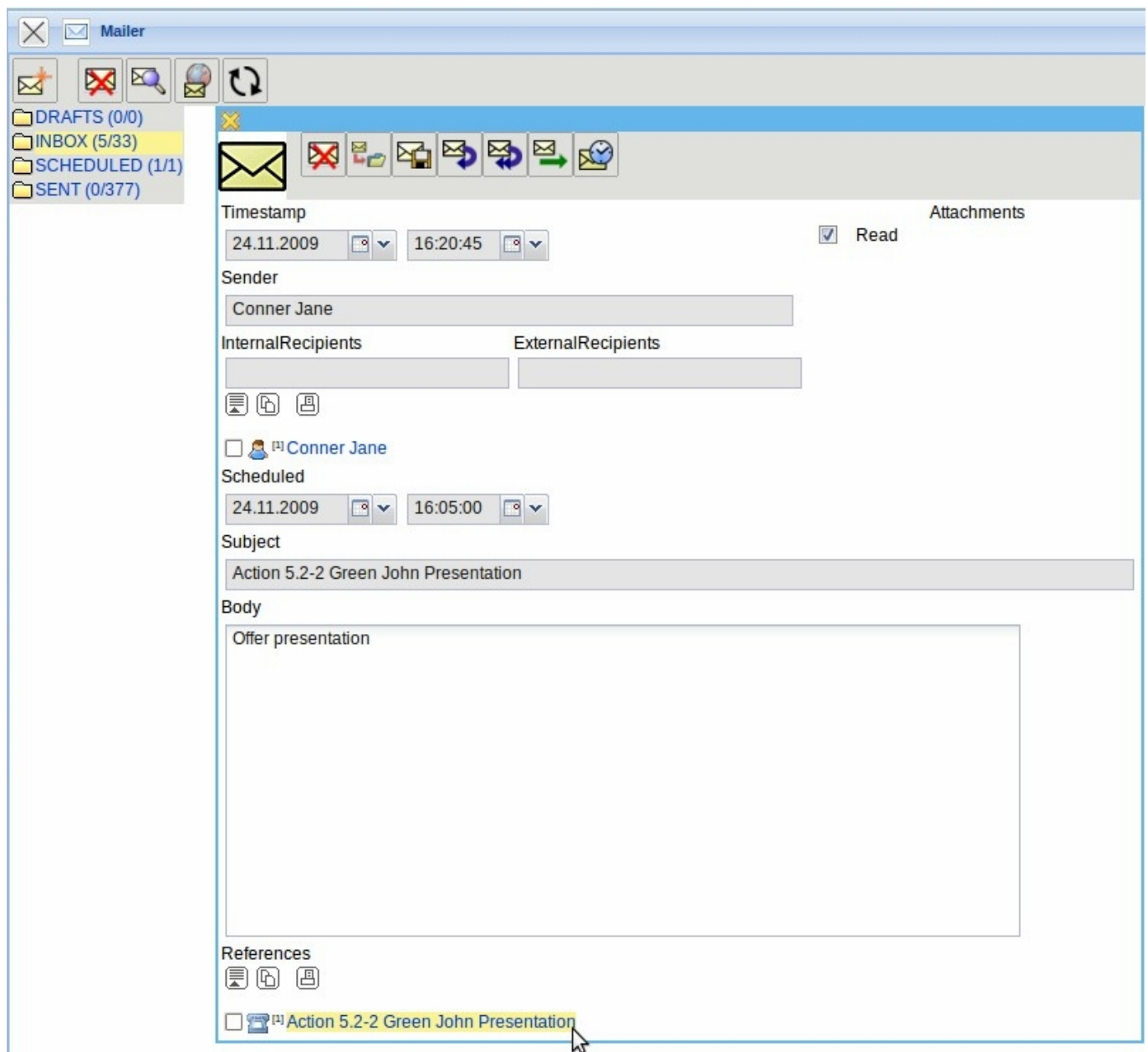
Note Offer presentation

Checked ☒

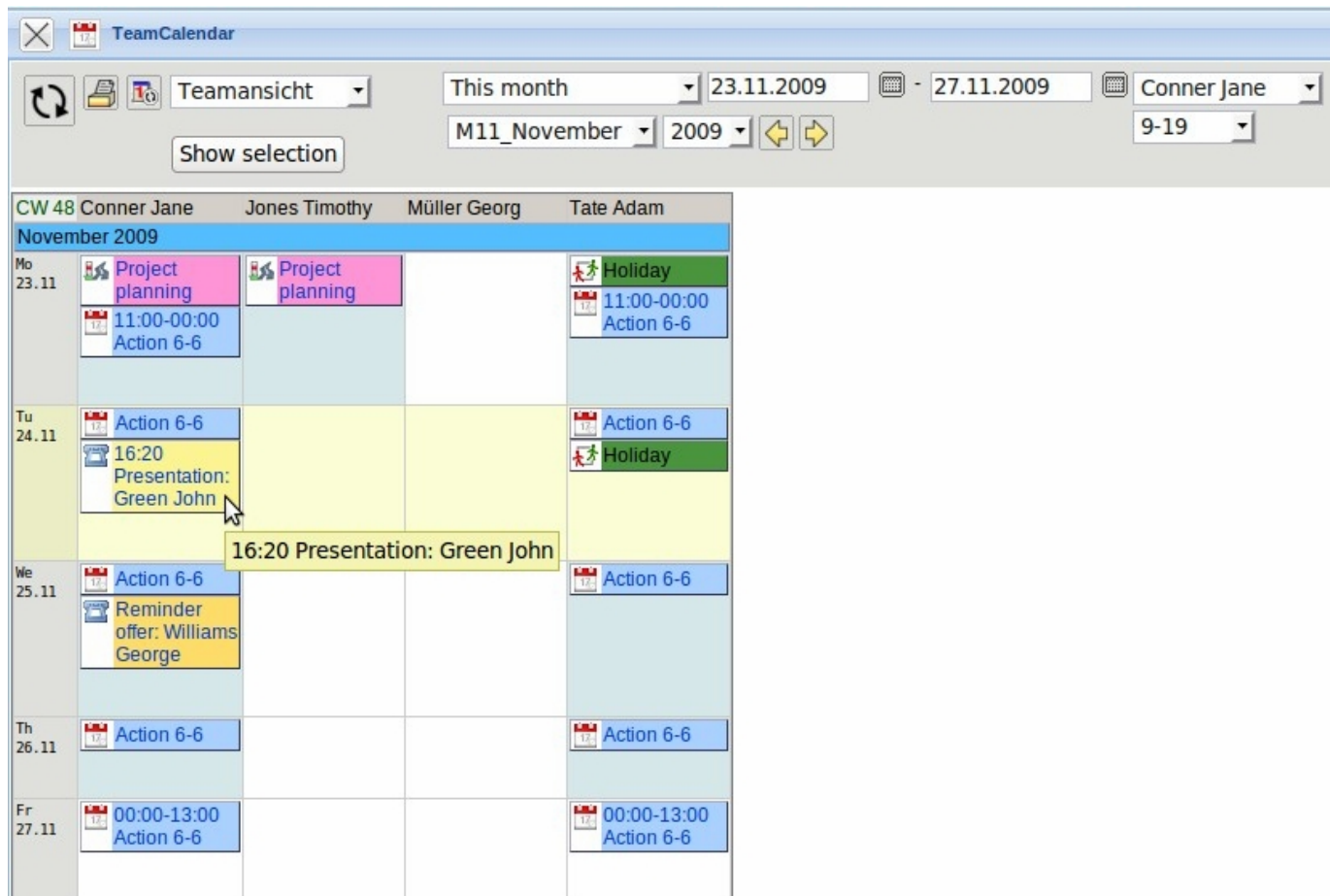
If the optional component [mailer](#) is used, the system generates automatically an e-mail message for this action on the given day ...



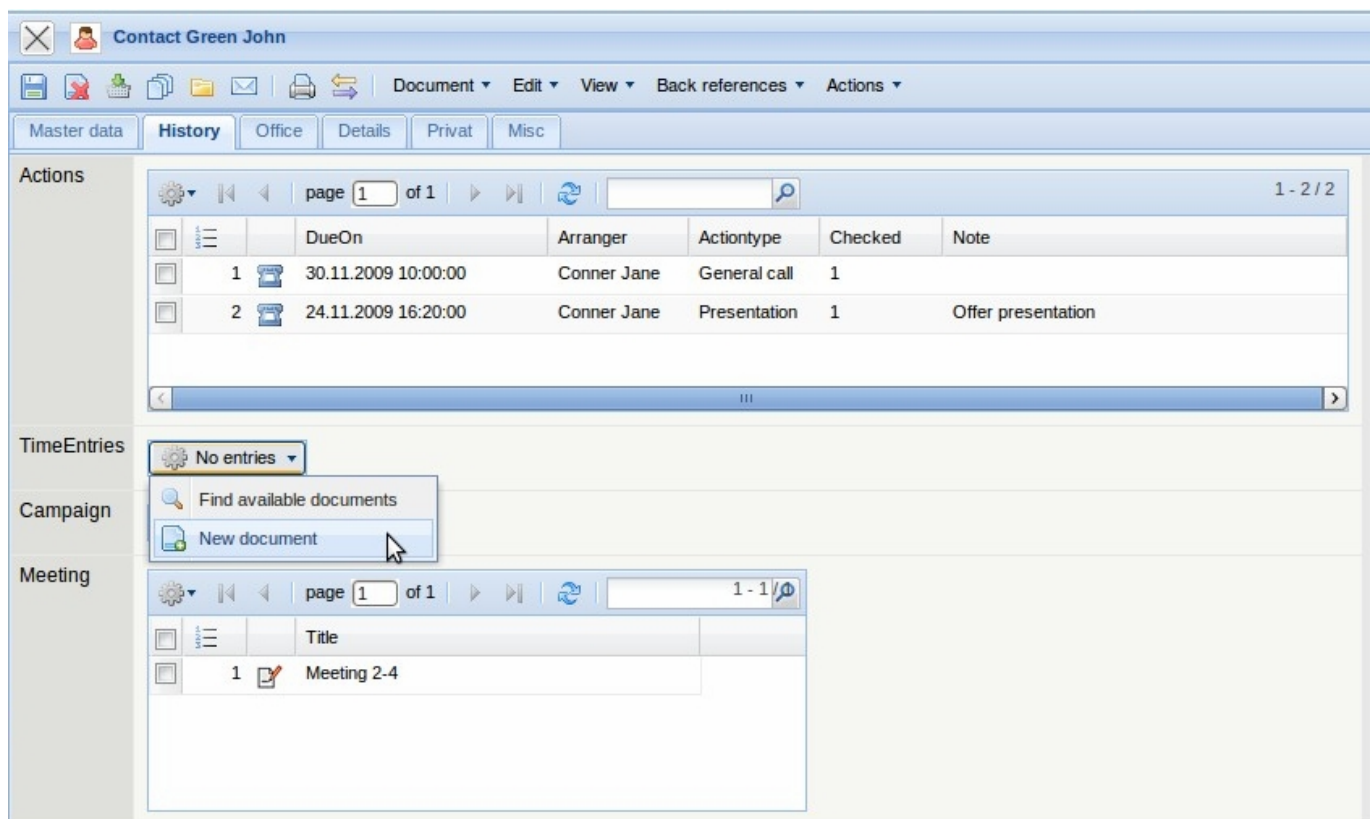
.. using the appropriate link.



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	16		
Name			
Category		Private	☐
Timespan	From	To	
Inviter			
Attendees	Employees	Unit	
	Send Invitations Send Invitations		
Agenda			

Time entry Workshop 24.11.2009 17:00:00

Document Edit View Back references Actions

Main Invitations **Project**

Contact [dropdown] [icon] [icon] [icon] [icon]

Project [dropdown] [dropdown] [icon] [icon] [icon] [icon] [icon]

Job [dropdown] [icon] [icon] [icon] [icon]

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

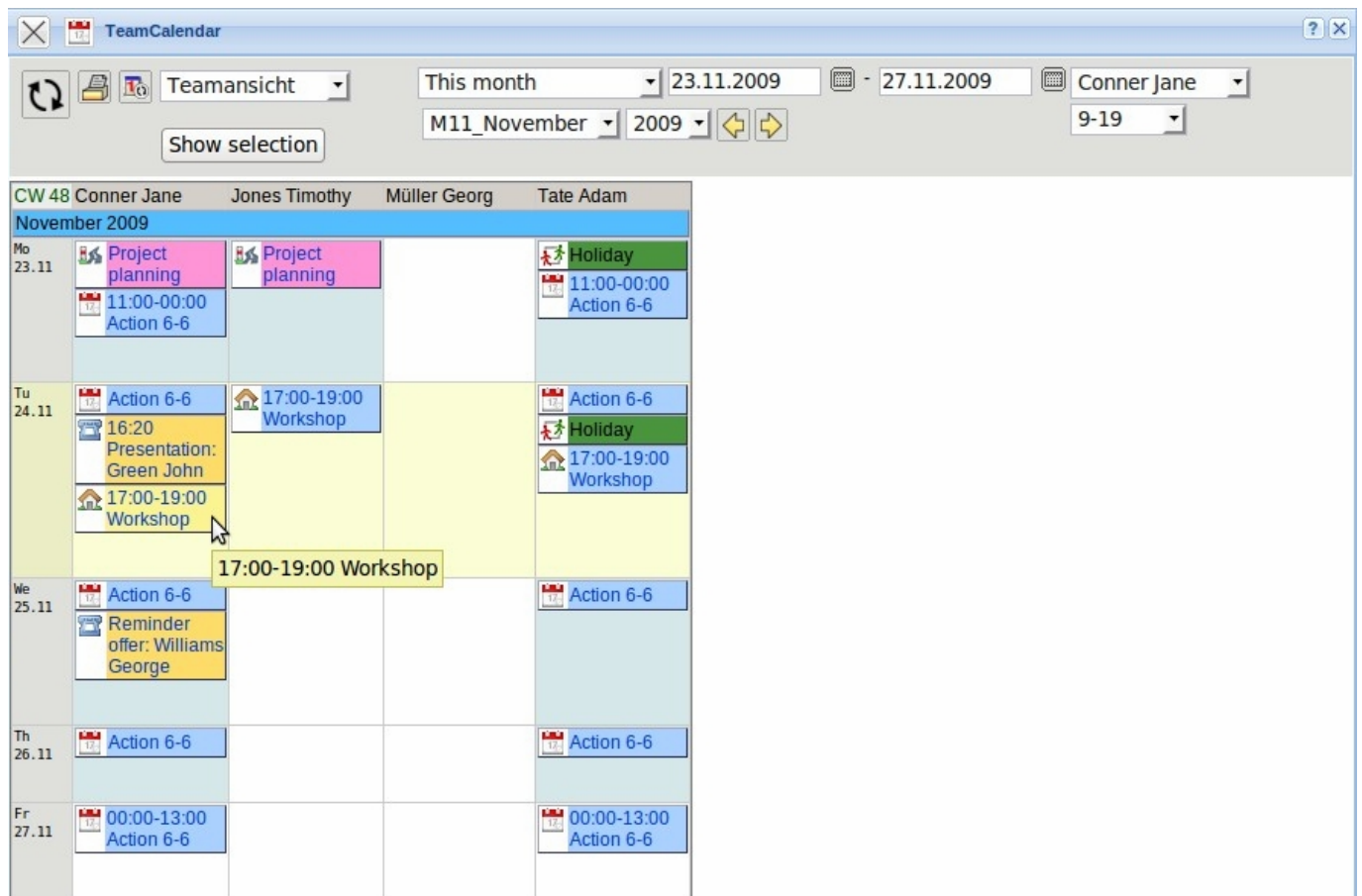
Attendees Employees Unit

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 ...

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 ...

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

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 in the year 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: 2

Description: Contact chart

Chart: Contact 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: Contact

Input data:

page 1 of 1

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

3. Main parameters: *Please select parameters:*

Chart period: Current year

Start: 01.01.2009

End: 31.12.2009

... 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 ...

Search

Selection: Open Actions

Name: Open Actions

Query: Action : ((Checked = "0") AND ((Employee.Name LIKE \$userlastname) AND (Arranger -> Employee)) AND (DueOn <= \$Datum))) SORT DueOn DESC

Lookup: Document types, Document fields, Field values

Report: Report (Open Actions), Format (VIEW), Chart period, Start, End, Period

... and sorts them by the descending date.

Query parameters

Please fill in missing parameters

Wildcard facilities: *, *abc, abc* and *abc* (all, all ending with abc, all starting with abc, all containing abc)

Nachname: Conner

Datum: 15.12.2009

OK

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

Open 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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