

Project Database Co

Developer of
ExhibitOffice + ManagEvent

Project Logs

Within a project there is a place where you can leave notes about the project, these notes may have resulted from a phone call from the client or a supplier. They could result in followups that need to be actioned by a staff member.

The screenshot shows the ExhibitOffice software interface. The window title is "PDC_Projects". The main area displays a table of logs for project "JN01360 Gift Co - Reusable Exhibit". The table has columns for Date, Time, Created By, Type, Contact, and Note. There are four rows of data. A "new" button is highlighted with a black arrow and the word "New" next to it.

Date	Time	Created By	Type	Contact	Note
30/04/10	5:51AM	Chris Lamb	Phone Call	Joan Gift	She confirmed the artwork is OK to go / Jess order the graphic
13/04/10	6:08PM	Chris Lamb	Phone Call	Joan Gift	I need 20 Stools the Green ones / Did Jessica Buy them ?
27/08/09	10:58AM	Chris Lamb	Follow Up	Joan Gift	Joan confirmed that the stand space is 9 x 3 metres for September and is a
27/08/09	10:57AM	Chris Lamb	Phone Call	Joan Gift	Need to talk to Joan about the finalisation of her stand space

They are linked to the project because they are created inside the project. In addition they can be linked to a Client Contact if relevant.

The create a New Log click on the "New" button. You will then be asked to select a Note Type, so select which is relevant (additional Note Types can be added in preferences).

We will use "Follow Up" for this example.

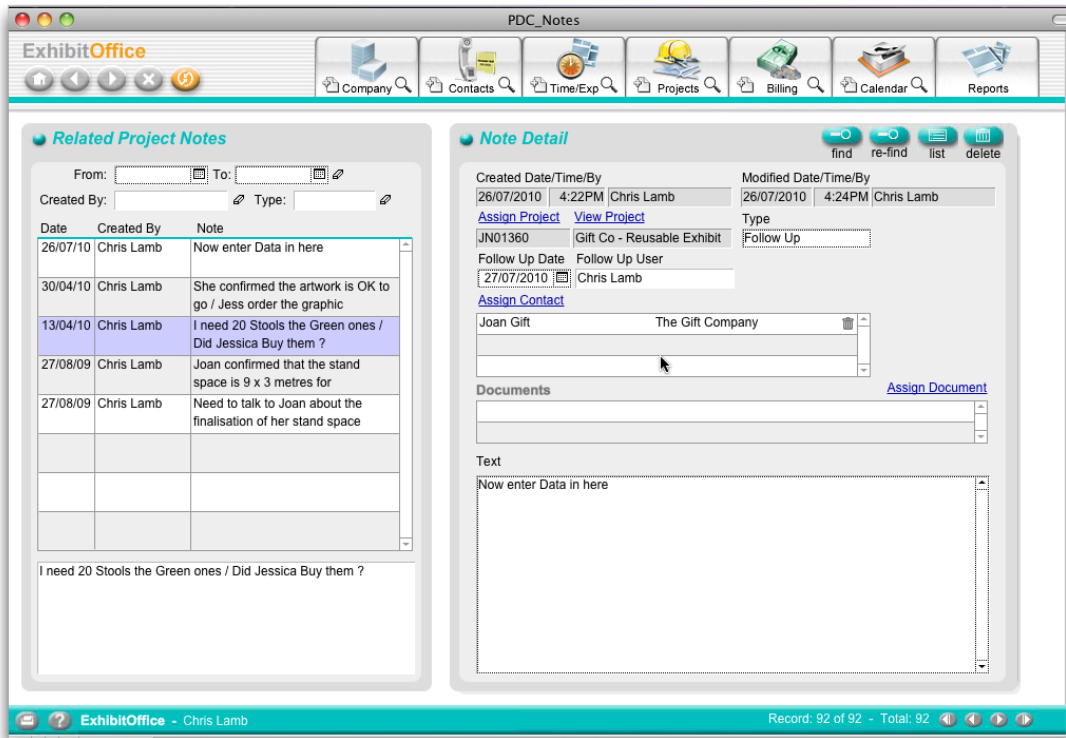
Type in the "Text" field the details about the note.

In this screen you can also set a follow up date and a Follow Up User.

In addition you can Assign a Contact this may have been the person who rang.

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To the left of the entry is a history of all the notes that relate to this project, if you click on a line item it will bring up details on the note in more detail as shown.

This follow up that I have set myself to do will appear on My Home Page on the 27th of June.

Because I have added Joan to this note as a contact this note will also appear on her contact page under Logs