

Project Details



A clean layout, logically grouped fields and intelligent ordering of Companies into role groups against the project characterise the new Project Details page.

Status icons are shown top right (as with the Project List) and the tick box indicates if the project is selected on the Project List page.



Any action chosen in the dropdown box will only act on this project alone (regardless of the "selected" tick):

- Select an action--
- Add to My Leads
- Add a Watch
- Print
- Extract
- Mail merge
- Mark as phoned (today)
- Mark as mailed (today)
- Archive
- Remove from My Leads
- Remove most recent mailed mark
- Remove most recent phoned mark
- Remove Watch

If the user has the Company & Contacts service then each company name can be clicked to go direct to the company details or use the List Companies button to view the involved Companies in a company list.

Project Notes Tab

Here a user can edit and save their own notes and view other users' notes where Sharing is turned on. Sharing is set by your account manager for a whole company account.

Your organisation's notes are set to be shared. Your colleagues will be able to view these notes.

Your Notes Last Saved - 26-Nov-09

test

Project History Tab

Displays date and type of certain (not all) updates that were made to the project. Feedback can also be submitted to the Research team from here.

Updates	
Stage	Updated On 04-Nov-09
Start	Updated On 04-Nov-09
Status	Updated On 04-Nov-09
Scheme	Updated On 04-Nov-09
Stage	Updated On 26-Sep-09
Status	Updated On 26-Sep-09
Stage	Updated On 28-May-09
Status	Updated On 28-May-09
Status	Updated On 05-Aug-08
Tender	Updated On 05-Aug-08
Title	Updated On 19-Jul-08
Stage	Updated On 19-Jul-08

Give Us Your Feedback

I am happy

I am satisfied

I need more information

It needs updating

*** Comments**

Set Watch