

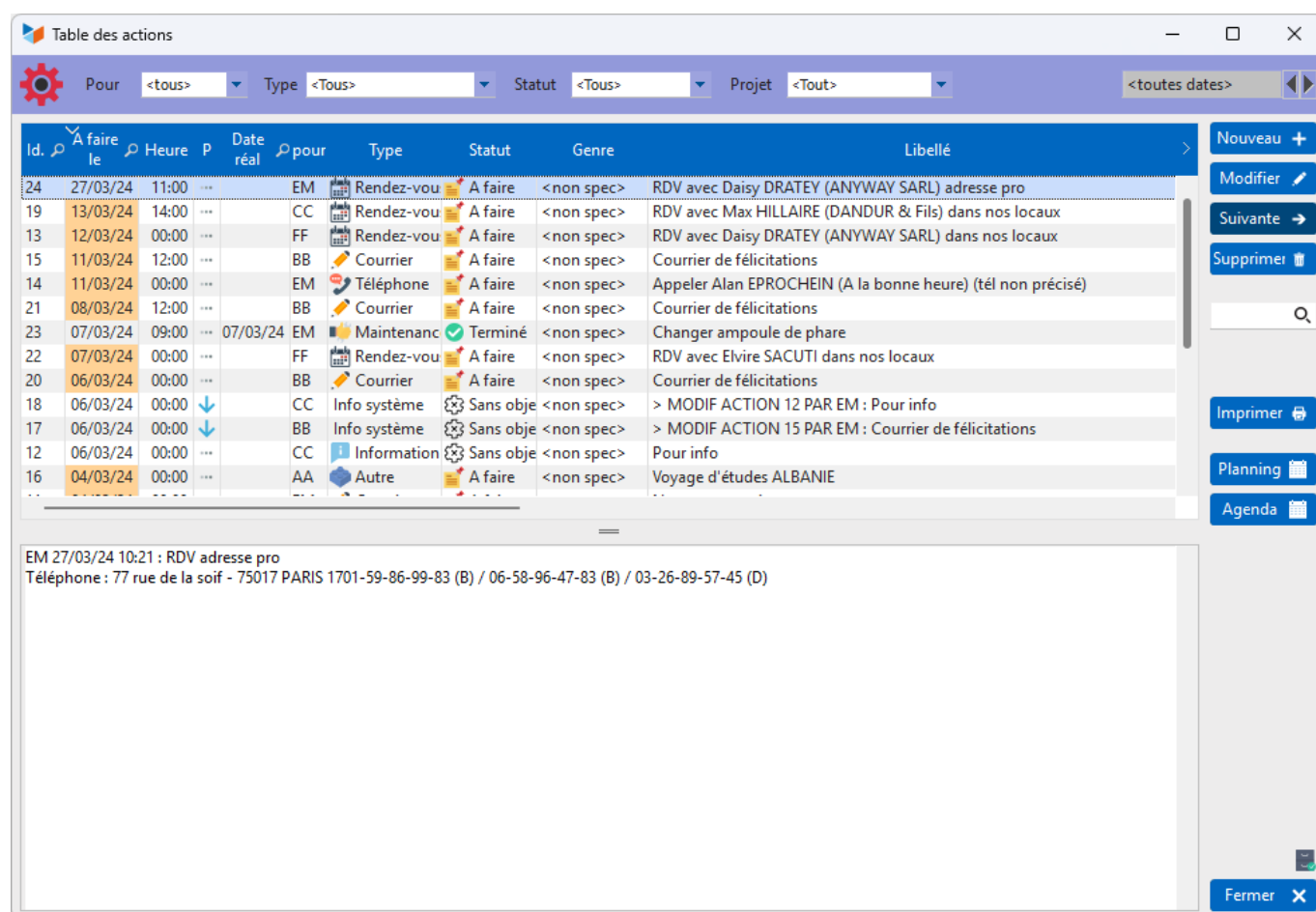
Actions

 **Fix Me!** A1 proofreading not yet effective for this page. In the meantime, you can ask any questions on the [forum](#).

Actions include everything you do internally in your company's activity: letters, telephone calls, appointments, etc.

They can be attached to any contact, and possibly to any project/task, and thus appear in the contact file, and/or in the project file.

List of actions



Id.	À faire le	Heure	P	Date réal	Pour	Type	Statut	Genre	Libellé
24	27/03/24	11:00	...		EM	Rendez-vous	A faire	<non spec>	RDV avec Daisy DRATEY (ANYWAY SARL) adresse pro
19	13/03/24	14:00	...		CC	Rendez-vous	A faire	<non spec>	RDV avec Max HILLAIRE (DANDUR & Fils) dans nos locaux
13	12/03/24	00:00	...		FF	Rendez-vous	A faire	<non spec>	RDV avec Daisy DRATEY (ANYWAY SARL) dans nos locaux
15	11/03/24	12:00	...		BB	Courrier	A faire	<non spec>	Courrier de félicitations
14	11/03/24	00:00	...		EM	Téléphone	A faire	<non spec>	Appeler Alan EPROCHEIN (A la bonne heure) (tél non précisé)
21	08/03/24	12:00	...		BB	Courrier	A faire	<non spec>	Courrier de félicitations
23	07/03/24	09:00	...	07/03/24	EM	Maintenanc	Terminé	<non spec>	Changer ampoule de phare
22	07/03/24	00:00	...		FF	Rendez-vous	A faire	<non spec>	RDV avec Elvire SACUTI dans nos locaux
20	06/03/24	00:00	...		BB	Courrier	A faire	<non spec>	Courrier de félicitations
18	06/03/24	00:00	↓		CC	Info système	Sans obje	<non spec>	> MODIF ACTION 12 PAR EM : Pour info
17	06/03/24	00:00	↓		BB	Info système	Sans obje	<non spec>	> MODIF ACTION 15 PAR EM : Courrier de félicitations
12	06/03/24	00:00	...		CC	Information	Sans obje	<non spec>	Pour info
16	04/03/24	00:00	...		AA	Autre	A faire	<non spec>	Voyage d'études ALBANIE

EM 27/03/24 10:21 : RDV adresse pro
Téléphone : 77 rue de la soif - 75017 PARIS 1701-59-86-99-83 (B) / 06-58-96-47-83 (B) / 03-26-89-57-45 (D)

The actions list screen allows you to filter actions by user, type, project, status, and year.

You can select multiple actions at once.

The **Process** button opens the action processing history tracking screen, below. This screen allows you to record the different processing steps of the action.

Follow-up of the action processing steps

Suite donnée

Rendez-vous

Suivi action

Historique

Libellé

RDV avec Daisy DRATEY (ANYWAY SARL) adresse pro

A faire le

27/03/2024

11:00

Suite donnée

RDV effectué. Client chaud pour notre proposition de tire-bouchon connecté.

L'action est :

Modifier

OK

Annuler

Suite donnée

Rendez-vous

Suivi action

Historique

EM 08/07/25 18:05 [A faire -> Terminé] : RDV effectué. Client chaud pour notre proposition de tire-bouchon connecté.

EM 27/03/24 10:21 : RDV adresse pro

Téléphone : 77 rue de la soif - 75017 PARIS 1701-59-86-99-83 (B) / 06-58-96-47-83 (B) / 03-26-89-57-45 (D)

Modifier

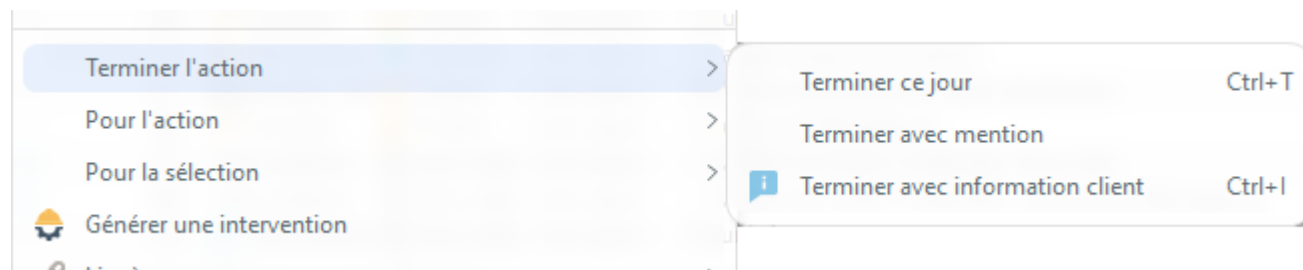
OK

Annuler

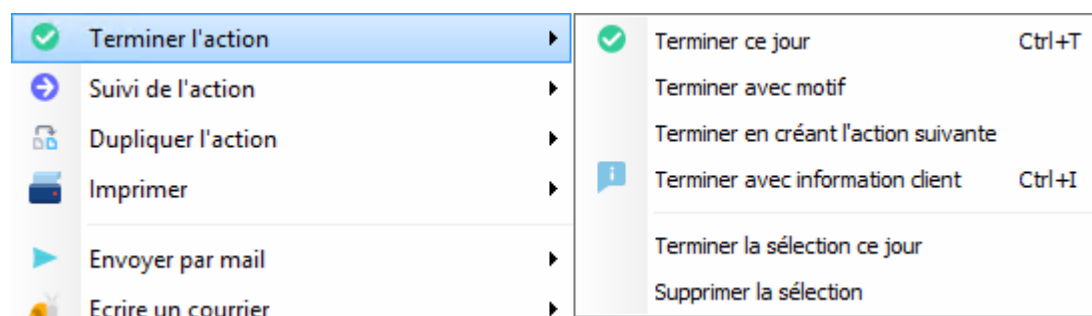
Above is an example of monitoring the "Monthly account statement" action.

Context menu

Here are the options available via the context menu:

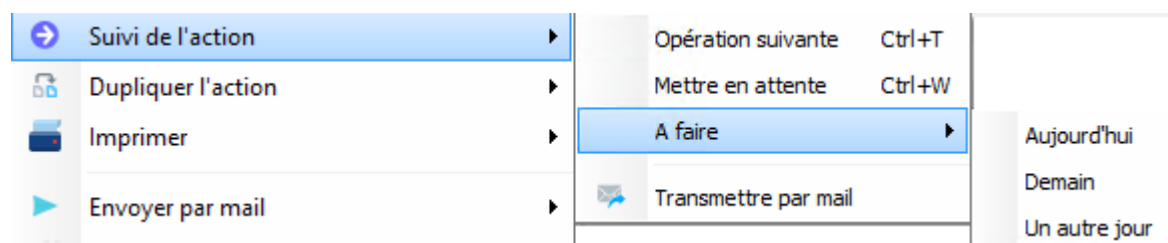


Complete action



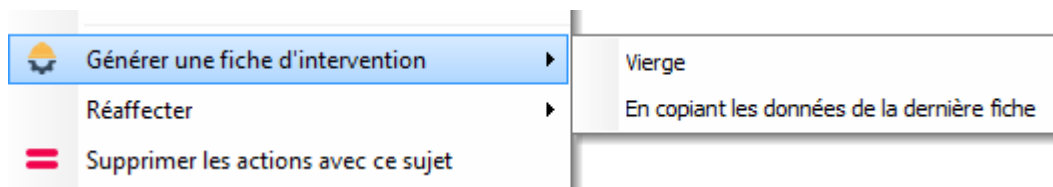
- **Finish with reason** will move the action to the completed status (at the date/time of entry), indicating in the action comments, automatically, the reason for the termination.
- **Finish with next action** creates an action of the same type as the action you want to complete, then ends it.
- **Finish with customer information** will trigger the sending of the "Operation completed" message by email, then complete the action.

Action tracking



- **Next operation** opens the tracking screen (same as the **Process** button).
- **Hold** changes the action status to "pending" (noting the status change in the history)
- To do **today**, **Tomorrow**, or **Another day** only changes the "To be done on" date of the action

Generate an intervention sheet



You can, from the selected action, create an intervention sheet.

This sheet can be:

- or **blank**, in this case only the action data will be used to create the intervention sheet
- or, **by copying the data from the last form** can integrate into the comments, the comments recorded in the previous intervention form for the same contact.

The Action sheet

 A screenshot of a web application window titled 'Rendez-vous'. The form contains the following fields:

- Avec**: Elvire SACUTI (DLC)
- Statut**: Affaire
- Par**: Flavie FROMENTAL (FF)
- Libellé**: RDV avec Elvire SACUTI dans nos locaux
- Genre**: <non spec>
- A faire le**: 07/03/2024 00:00 au 08/03/2024 00:00
- Lieu**: 88 avenue des ternes 75017 PARIS
- Notes**: EM 06/03/24 18:24 : RDV dans nos locaux
Contact tél : 03-04-56-04-88 (B)
- Archivé**: ☐
- Buttons**: Valider (with checkmark icon), Annuler (with X icon)

Above, an example of a “Work” type action sheet.

The **To be done on** and **to** fields allow you to define a completion range for the action. If hours are entered, the action can be displayed in the schedule.

The number of days in the **Show** field allows this action to be displayed X days before it must be carried out, in the todo list. Indeed, certain actions must be carried out before their planned completion date.

Check the **Archived** box to not display the action in the list of actions on the contact list screen.

Express list of actions

Access: Activity → Actions → Express list

Id	T	Genre	A faire le	Heure	Fait le	Traitant	Commentaire	P	Statut	Raison sociale	Nom, p
28		<non spec>	08/07/25	15:45		EM	RDV avec Adh�mar HOCQUARD DE TOUR (Work and C*)	...	A faire	Work and C*	HOCQU TOUR A
27		<non spec>	08/07/25	11:00		EM	RDV avec Alain PROVISTE	...	A faire	PROVISTE Alain	PROVIS
26		<non spec>	08/07/25	09:00		EM	RDV avec Daisy DRATEY (ANYWAY SARL)	...	A faire	ANYWAY SARL	DRATEY
25		<non spec>	08/07/25	17:00		EM	Maintenance VEH1 Triumph collection Olger HARTMAN (VAL DE WEISS) --- EM 08/07/25 16:39 : Changer ampoule	...	A faire	VAL DE WEISS	HARTM

The objective of this screen is to offer a practical and quick tool to people who are expected to use actions intensively, and especially salespeople. For the record, it initially only managed phones, then we added all other types of actions to it.

The screen presents the latest actions to be carried out, with a play of colors making it easy to identify the actions to be done for the day, those which have priority, those which are overdue.

Purification of actions

Access: via Tools → Administration → Data processing → Actions → Action purification

This program is only accessible to administrators.

This program allows you to permanently delete all actions up to the date specified in the **Purge by** field.

If a character string is specified in the **Pure Lib** field, only the actions containing this string in their description will be deleted.

Tips and tricks

✿ You can be notified of any modification, deletion, or change in action status. For example, if you create actions that must be assigned to someone else, it is possible to be notified when the action is completed by the person who must execute it, or to prohibit any action modification to a user other than the one who must carry it out or who created it. For this, see the [general parameterization](#) of Gestan.

✿ You can declare an unlimited number of types of actions via the [configurable labels](#) screen.

✿ Note that it is possible for a user to delete a system message intended for them, even if they do not have the rights to delete their own actions. Conversely, it is not possible to delete a system action intended for another user, even if the deleting user has all rights.

Other Activity articles

[Action planning](#)

[Actions](#)

[Agenda of actions](#)

[Ingredients](#)

[Intervention planning](#)

[Interventions](#)

[Personal service tax certificate](#)

[Planned actions](#)

[Typical process and steps](#)

From:

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Last update: **2025/06/24 21:16**