

Contact Management

Contact Management allows a user to create Contacts independently of Accounts. This means that Contacts can exist without having to be associated/linked to an Account. At the time of creation, a Contact is not linked to an Account regardless if an Account is current. Contacts can be Public (accessible by other Users) or Private.

In order to associate a Contact with one or more Accounts, the User must use the Add a Contact to Accounts function.

Note: Private Contacts, when associated to an Account, will be visible to all Users that have access to that Account. However, Private Contacts cannot be updated by other Users - only by the Owner of the Contact.

Ownership of Contacts can be transferred by the Edit Contact operation.

1. View all Contacts

By selecting the Contact Management button, the User will be presented with a table of all Contacts and summary information.

This table will only display Contacts which the User has permissions to View.

If access is needed for a Contact that is not in this list, contact the application Administrator to change the Users privileges.

2. View all Contacts for an Account

The User can view a summary of Contacts via the View Account screen: Contacts tab - view all Contacts associated to an Account

Refer [View an Account](#) section.

3. Search for a Contact

There are 2 methods to search for a Contact. The first is on the Banner Section using the Global Search function. Refer Global Search section.

The other method offers more fields and options to refine the search and can be accessed by

selecting Contact Management from the Menu Bar then selecting Search Contacts from the Left Menu Section.

The User can search for a Contact or a list of Contacts by filtering on the following criteria:

- Account name
- Title
- First name
- Last name
- Job title
- Work phone number
- Mobile phone number
- Email address
- Primary contact indicator
- Public contact indicator

4. Create a Contact

Contacts can be created independently of Accounts. This means the User does not have to select an Account before creating a Contact.

Note: A Contact is not automatically associated with an Account. This must be done manually. Refer to: Add a Contact to Accounts

All required fields are in **bold**

Field	Description
Title	Salutation title
Other title	If the appropriate title is not available from the presented list
First Name	
Middle Name	
Last Name	
Job Title	
Contact Type	Indicator if Reseller, Partner or Normal contact
Public indicator	If Public then visible to everyone, if Private only visible to Contact Owner
Contact Owner	The User who owns this Contact

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Primary Contact Indicator	Indicator if this is the main Contact
Work Phone	
Extension	
Home Phone	
Mobile Phone	
Fax number	
Email Address	
Assistant Name	
Assistant Title	
Assistant's job title	
Assistant Phone	
Assistant Extension	

Table 1:

Depending on the Users privileges, this function may not be available. If access is needed, contact the application Administrator to change the Users privileges.

5. View a Contact

Contact details can be displayed by selecting (clicking) Contact name link (where Contact name is underlined) where available on some screens or from the View All Contacts table (displayed when Contact Management action is selected).

Depending on the Users privileges, some Contacts may not be visible. If access is needed, contact the application Administrator to change the Users privileges.

All Contact details are displayed along with a number of tabs at the bottom. These tabs provide summary information in relation to the Contact. The tabs are:

5.1. Accounts tab

Accounts tab - view all Accounts for a Contact

Displays:

- Account number
- Account name

- City/Suburb of the Mailing address
- Phone number
- Account Owner
- Account status
- External reference

5.2. Sales tab

Sales tab - view all Sales/Leads for a Contact

Displays:

- Sale ID
- Account name
- Product name
- Total amount
- Sale/Lead status
- Sale Probability
- Last Contact Date

5.3. Notes tab

Notes tab - view all Contact Notes

Displays:

- Date Note was created
- Date Note was updated
- Short description
- View/Edit/Delete operations

5.4. Attachments tab

Attachments tab - view all Attachments for a Contact

Displays:

- Date Attachment was created
- Date Attachment was updated
- Filename
- Short description
- View/Edit/Delete operations

6. Edit a Contact

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This function is accessible from the Left Menu Section. It allows the User to change and update any Contact details.

Depending on the Users privileges, this function may not be available. If access is needed, contact the application Administrator to change the Users privileges.

7. Delete a Contact

Depending on the Users privileges, this function may not be available. If access is needed, contact the application Administrator to change the Users privileges.

8. Add a Contact Note

Notes can be used to store additional or background information. The User can create a Note by selecting the Add Note link in the Left Menu Section.

9. Delete a Contact Note

This operation is only accessible from the View Contact screen.

To perform this action:

- Select View Contact function to access the tabs (below Contact details)
- Select the Notes tab to access the operations View, Edit, and Delete
- Select Delete

10. View all Contact Notes

The User can view a summary of Notes via the View Contact screen: Notes tab - view all Contact Notes

Refer [View a Contact](#) section.

11. Add a Contact Attachment

Attachment can be used to store large amounts of information. The User can create an Attachment by selecting the Add Attachment link in the Left Menu Section.

12. View a Contact Attachment

This operation is only accessible from the View Contact screen.

To perform this action:

- Select View Contact function to access the tabs (below Contact details).
- Select the Attachments tab to access the operations View, Edit, and Delete.
- Select View or the Created Date.

13. Edit a Contact Attachment

This operation is only accessible from the View Contact screen.

To perform this action:

- Select View Contact function to access the tabs (below Contact details).
- Select the Attachments tab to access the operations View, Edit, and Delete.
- Select Edit.

14. Delete a Contact Attachment

This operation is only accessible from the View Contact screen.

To perform this action:

- Select View Contact function to access the tabs (below Contact details).
- Select the Attachments tab to access the operations View, Edit, and Delete.
- Select Delete.

15. Add a Contact to Accounts

This function is accessible on the Left hand Menu. It is used to associate a Contact with one or more Accounts.

Note:

Once the Contact is associated with an Account the Contact will be Viewable (but not Editable) by all users that can see the Account, even if the Contact is not public.