

Enterprise - How to Add a Contact

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Contacts vs. Contact roles

There is a big difference between adding a *contact to a customer* and adding a *contact role*.

Adding a *contact to a customer* allows for tracking of sales efforts, documenting conversations, tracking preferences, etc. Contacts are the customer's buying influences and decision makers.

Adding a *contact role* allows a contact to default onto an order for easy access to their contact information; this is especially helpful when an employee is going to be late or absent.

Adding a Contact to a Customer

From the customer visifile, select the + icon to add a contact:

The screenshot shows the 'Jetson Appliance (Primary)' customer visifile. The interface includes a navigation menu on the left with 'visifile' selected. The main content area is divided into several sections: 'customer snapshot' with fields for Customer Name, ID, Branch, and Status; 'financials' with a table of sales and payment data; and 'contacts' with a red box around a '+' icon. The 'contacts' section currently shows 'No Records Found'.

Customer Name	Customer ID	Branch	Status
Jetson Appliance	4295010869	Memphis SE	Active

financials	YTD Sales	Lifetime Sales	Sales Trailing
Last Payment	\$0.00	\$0.00	\$0.00
Balance Due	\$0.00	\$0.00	\$0.00
AR Balance	\$0.00	\$0.00	\$0.00
Credit Limit	\$0.00	\$0.00	\$0.00

contacts
No Records Found

This will open the *add new contact* window:

? X

add new contact

Contact
Import from Outlook

personal information

First Name

Last Name










Title

Nickname

Honorific

Scan Business Card

Upload a custom avatar by dragging an image into this box.

customer information

Customer

Department

Address

contact information

Street

Street 2

City

State

Zip Code

Country

Phone

Fax

Email

other information

Status

0
 Save

Document all interactions with the contact as (2.) messages and (3.) personal calls from the contact record:

The screenshot displays a CRM profile for James Jetson, Owner of Jetson Appliance. The interface includes a top navigation bar with notification alerts, a left sidebar with a 'visifile' menu, and a main content area with several sections:

- contact snapshot:** A form showing contact details like Title (Owner), Status (Active), Company Name (Jetson Appliance), Branch (Memphis SE), Email (Jim@JetsonAppliance.com), and Date (10/2/2015 3:27:00 PM).
- 1. phone/email:** A section containing contact information: Jim@JetsonAppliance.com and (651) 568-5687.
- 2. messages:** A table of messages with columns for Date, Action, Rep, Due, Message, and Customer. It shows two messages from 10/2/2015.
- 3. personal call list:** A table with columns for Date, Summary, and Repname. It lists a call on 10/2/2015 with the summary 'Possibly help with peak season November and...'.
- 4. contact groups:** A list showing 'Dalyce's Prospect List'.
- 5. interest codes:** A list of codes including 'Bilingual-Spanish', 'Driver Helper', and 'Drivers'.
- 6. documents:** A menu item in the 'visifile' sidebar.

1. Track the contact's phone numbers and email addresses.
2. Log all interactions (emails, phone calls, meetings, lunches, etc.) with this contact as messages.
3. Use the personal call list to document crucial face-to-face meetings.
4. Add the contact to a contact group for mass marketing and managing of contacts.
5. Tag the contact with relevant interest codes (e.g. skills they seek in candidates, certifications required to work within said contacts departments, etc.).
6. Attach documents such as performance reviews.

Once the contact has been added to the customer, from the customer visifile, view the (1.) contact(s) affiliated with this customer and all messages logged from the contact record (2.):

Jetson Appliance (Primary)
1252 Hennepin Road
Eagan, MN 55121
ID: 4295010869

Branch: Memphis SE | Status: Active

Customer ID: 4295010869 | Root ID: 4295010869

Customer Tree: Account View

financials

Last Payment	YTD Sales	\$0.00
Balance Due	Lifetime Sales	\$0.00
AR Balance	Sales Trailing	\$0.00
Credit Limit		\$0.00

contacts

Name	Title	Office Phone
Jetson, James	Owner	(651) 568-5687

messages

Date	Action	Message	Rep	Contact
10/2/2015	Cold Call--1st Cont	Is willing to talk next week, call on Monda...	dwood	Jetson, James (Jetson Appliance, Primary)

Adding a Contact Role

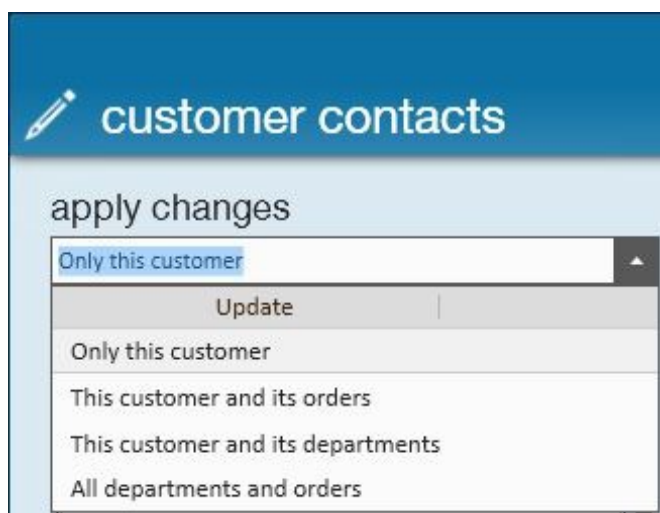
Once a contact has been added, contact role(s) designating if they will typically be the report to person, the supervisor, the ordered by person, etc. on the orders being placed by the customer, can be setup.

From the *contact roles* table within the details page of the customer record, click the pencil icon to manage contacts:



This will open the *customer contact* form.

Select the records to apply the Contact Roles to:



The roles can be applied to:

- **Only This Customer:** The contact role will be added to any new orders for this level (department) of the customer
- **This Customer And Its Orders:** The contact role will be added to any new *and pre-existing* orders for this level (department) of the customer
- **This Customer And Its Departments:** The contact role will be added to any new orders for this level (department) of the customer and any departments and sub-departments beneath it
- **All Departments and Orders:** The contact role will be added to any new *and pre-*

existing orders for this level (department) of the customer and any departments and sub-departments beneath it

Select the contact for whom the role should be applied:

contact

Jetson, James

Last Name	First Name
Jetson	James
Lansing	Sandra

Select the role for that contact by clicking the (1.) + icon next to the role desired. The role will be displayed within the (2.) assigned contact roles section:

customer contacts

apply changes

Only this customer

contact

Jetson, James

available roles

- Hiring Mgr **1.** +
- HR Coordinator +
- InvoiceEmail Contact +
- Order Request Creator +
- Order Request Email Contact +

assigned contact roles

Overwri...	Last Name	First Name	Role
2.	Jetson	James	Supervisor

Save

Contacts can have multiple, different roles:

assigned contact roles ✕

Overwri...	Last Name	First Name	Role
	Jetson	James	Supervisor
	Jetson	James	Hiring Mgr
	Lansing	Sandra	Ordered By

To remove a role, highlight the contact and select the x icon.

assigned contact roles ✕

Overwri...	Last Name	First Name	Role
	Jetson	James	Supervisor
	Jetson	James	Hiring Mgr
	Lansing	Sandra	Ordered By
	Landry	Jennifer	Ordered By

The contact roles will be reflected in all orders for the customer/departments within the order details form:

Order Details | Web Options | ACA Surcharge

customer information

Customer ID: 4295010869 | Work Site: Primary
1525 Hennepin Road, Eagan, MN 55121

Worker Comp: MN 8810

Alt Order ID:

Directions:

job information

Required: 1 | Assigned: 0

Order Type: TE Temp

Job Title: Unknown

Description:

Dress Code:

Safety Notes:

Start Date:

Duration: Indef

Est. End Date:

Shift:

Start Time: ! | End Time: !

Shift Notes:

Sun Mon Tues Wed Thu Fri Sat

financial details

Multiplier: None | Pay Periods: 52

Bill Rate: \$0.00 | Pay Rate: \$0.00

Unit Bill Rate: \$0.00 | Unit Pay Rate: \$0.00

OT Factor: 1.5000 | Other Agency Pay: \$0.00

Overtime Bill: \$0.00 | Overtime Pay: \$0.00

Doubletime Bill: \$0.00 | Doubletime Pay: \$0.00

Overtime Plan: PlanSTD | GP Percent: %

Desired GM %: | GP Estimate: \$0.00

contacts ✎ ✉ 📞 📅

Name	Description	Office Phone
Jetson, James	Hiring Mgr	651-568-5687
Lansing, Sandra	Ordered By	324-234-2344
Jetson, James	Supervisor	651-568-5687

other information

Status: Unfilled | Taken By: dwood

Sales Team: Default | Branch: Memphis SE

Do Not Auto-Close: | TW Time Clock: | PeopleNet:

Notes:

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