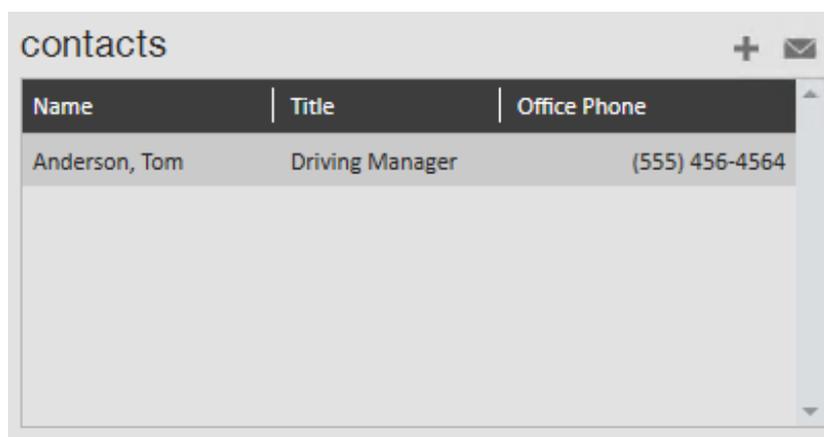


Core - How to Add a Contact Record

Last Modified on 11/01/2019 9:23 am CDT

What is a Contact Record?

The contact record stores information related to people you correspond with from specific customers. These can be owners, CEOs, supervisors, AR/AP, hiring managers, etc. Because each customer can have multiple contacts that can change overtime, contact records are technically separate records. This allows you to deactivate records as contacts leave customers or change roles.



Name	Title	Office Phone
Anderson, Tom	Driving Manager	(555) 456-4564

How to Add a Contact:

1. Navigate to the visifile for customer record you want to add a contact to.
2. Select the '+' icon next to the contacts section.
3. A new window will open, enter the contact name (the only required fields are first and last name).
4. Enter any additional details including contact methods (email, phone, etc.).
5. Select 'Save.'
6. You will be redirected the detail page of the contact record.

add new contact

Contact Import from Outlook

personal information

First Name 

Last Name 

Title

Nickname

Honorific

customer information

Customer Anderson Trucking  

Department Primary

Address Primary
123 Cliff Rd
Saint Paul, MN 55121 

contact information



Street 123 Cliff Rd

Street 2

City Saint Paul

State MN 

Zip Code 55121-____ 

Country United States of America 

Phone

Fax

Email

custom avatar

Upload a custom avatar by dragging an image into this box, or select from the default avatars below.



other information

Status A Active 

2 

 Save

Logging Messages on Contact Records

When logging a message on a contact record, keep in mind that it will automatically link the related customer record. This means that when a message is logged for a particular contact, it is also logged on the customer record so the same information can be displayed in both places. For more information on logging messages see [Core - Logging Messages](#) </p>

contact snapshot		phone/email	
Title	Driving Manager	Status	Active
Company Name	Anderson Trucking	Branch	Temp Branch
Email	tomanderson@nowhere.com	Date	1/8/2019 2:14:00 PM
Notes			

phone/email

- ✉ tomanderson@nowhere.com
- ☎ (555) 456-4564

messages

No Records Found

Deactivating Old Contacts

Once a contact is no longer working for a customer or has changed roles completely, you can deactivate their record to show that they should no longer be contacted. This allows you to keep messages logged and information saved in case this contact come back or you need that information for your records.

To deactivate a contact, log a message using the action code "Deactivate". In the body of the message, enter the details as to why you are deactivating this contact record.

Related Articles
