

# Contacts Overview

## Contacts Main Window

Contacts are split to company and person within Atollon. You can create them separately, but it is possible to link person with company using contact relationships.

Contacts database is used to store primary contact information (e-mails, phone, mobile, social URLs, etc.), contact addresses (various types), bank account information and several other fields.

## Contact Types

Once you set **Contact Type** information (client, partner, employee, etc.), new Contact Folder is created automatically in Finder. Contact Folder may contain additional information & functions based on Folder Type, for instance Form (with various custom fields), Messaging Tab, Calendar, Tasks, Projects & Folders, Time Sheet, Orders, Invoices and much more.

## Set Contact Type

Open any existing contact or create new, see the Contact Type section and select the appropriate contact type, such as:

- Client
- Partner
- Employee
- Supplier
- ...

You can also set Contact Type for multiple contacts at the same time using Drag & Drop function. Simply select more contacts and Drag & Drop them on displayed Contact Type (left panel in Contacts application).

## Un-set Contact Type

It is possible to un-set contact's Contact Type only by removing particular Contact Folder from Finder.

## Create new/Adjust Contact Type

It is possible to create / remove Contact Types using [Finder configuration](#). Simply remove or add Folder type in Context Settings.

## Contact Information

Contact information is the basic e-mail, phone, mobile, Facebook account, Twitter account or LinkedIn account stored in connection with the contact (person or company).

It is possible to add more contact information records to each contact.

If there are more contact information records, one of them may be set as primary (for instance phone (work) from set of all phone numbers).

One primary contact channel (e-mail (work) for instance) may be selected for all contact information records.

## Contact Information Types Customization

It is possible to add/remove Contact Information from Atollon and in this way customize list of Contact Information, such as e-mail (home), e-mail (work), e-mail (other) for some other values.

Go to Windows Admin client > Settings > Contacts > Settings and select appropriate configuration list.

## Contact Groups

It is possible to add each contact (person or company) into one or more Contact Groups.

## Contact Groups & Mass Mail

The membership of the contact in Contact Group is used mainly to use Mass Mail functions. You can double-click the Contact Group in Contacts application and more details of the Contact Group may appear. It is also possible to allow/disallow sending the contact mass mail using the selected

Contact Group this way.

# Add Contact to Contact Group

There are more ways to do this task. One of them is simply drag & drop selected contacts into group displayed in accordeon on left panel in contacts database. Another is to open each contact individually and select appropriate checkbox in Contact Groups fields. Description may be added that associates contact with the Contact Group.

# Contact Relations

It is possible to link contacts together. There are the following relations available:

- person x company relations - indicates employer / employee relationship
- company x company relations - indicates two types of relations: equal level (partners) or master/slave level (mother / division)
- person x person relations - indicates two types of relations: equal level (friends) or master/slave level (superior / subordinate)

Person x company relations may have additional attributes, such as Position in company and Department, incl. some notes.

Contact relations are displayed in tree and you can browse contacts relationship tree into almost indefinite level, which helps to understand influence to your sales opportunities or clients and may help you build your referral business.

---

Revision #1

Created 15 March 2020 06:45:53 by Jan Safka

Updated 16 March 2020 17:11:02 by Jan Safka