

New Contact in Detail

Person vs Company

The image shows two side-by-side screenshots of software forms for creating a new contact. The left form is titled "New Company" and the right is "New Person". Both forms have tabs for "Contact" and "Relationships". The "New Company" form has a "Basic information" section with fields for Name, Legal form, Reg. No., VAT No., Category, and Due Days. The "New Person" form also has a "Basic information" section with fields for Prefix, First name, Last name, Middle name, Suffix, Salutation, Gender, Status, Date of birth, Language, Category, and Contact Source.

New company

Legal form - eg. Inc., s.r.o., a.s. ...,

Reg. No. - it's company registration number,

VAT No. - it's company VAT number,

Category - most simplest categorisation,

Due Days - it's number of days when the invoices are in due.

New person

Prefix

Fist name

Last name

Middle name

Suffix

Salutation - this field will be transfered on e-mails while using the `{SALUTATION}` tag in e-mail template. See the section `{wiki:EmailTemplating}`

Gender

Status

Date of birth

Language

Category - most simplest categorisation,

Contact Source - where we get this contact (should be modified) - eg. web, newspaper, friend,

competitor ...

Industry (only for new company)

▼ Industry 1

Industry: Banking

X 2 Description: Description

☒ primary

Industry: Insurance

X Description: Description

☐ primary

+ 3

Fields:

Industry - for selecting company industry.

Description - for additional description of that industry for specific company.

Primary - check box for selecting which industry is the primary one.

Functions:

1. **Collapse/expand** section - by clicking text with black arrow.
2. **Remove** industry from contact - by clicking the cross (which is red when going your mouse cursor over).
3. **Add** new industry to contact - by clicking the plus (which is green when going your mouse cursor over).

Contact address

▼ Contact address 1

Type: Correspondence

Address: Address

Zip: Zip

City: City

X 2 Region: Region

Country: State

Locate on map 4

☐ primary

+ 3

Fields:

Type - user-definable type of address (eg. Correspondence, Invoicing, Delivery, ...)

Address

Zip

City

Region

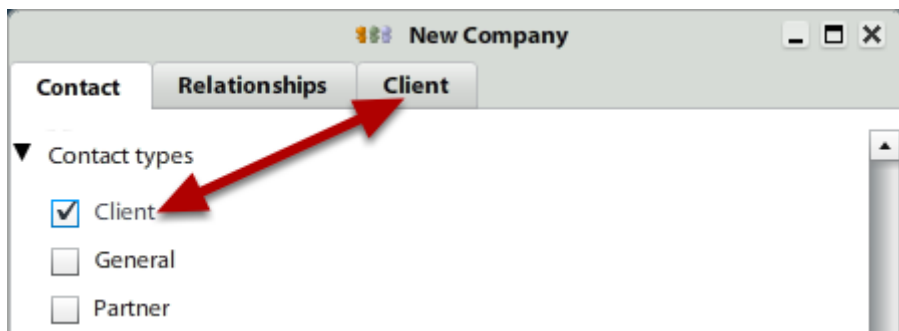
Country

Primary

Functions:

1. **Collapse/expand** section - by clicking text with black arrow.
2. **Remove** contact address from contact - by clicking the cross (which is red when going your mouse cursor over).
3. **Add** new contact address to contact - by clicking the plus (which is green when going your mouse cursor over).
4. **Locate address on map** - by clicking the Locate on map button (this will open new window with google maps).

Contact types



Fields:

Depends on implementation. There might be ten or no one.

Functions:

By selecting one or many check boxes there will appear one or many new tab with same name. With this we are saying that "this new contact is Client and we want to see it in Finder (see the section `${wiki:Finder}` under the folder called Client".

Contact information

▼ Contact information **1**

The screenshot shows a contact information form with three sections. Each section has a 'Type' dropdown, a 'Contact' text field, a 'Description' text field, and a 'primary' radio button. The sections are for 'E-mail (work)', 'Mobile', and 'ICQ'. Annotations are as follows: 1. A black arrow pointing to the 'Contact information' header. 2. A red 'X' icon to the left of the 'E-mail (work)' section. 3. A red '+' icon at the bottom left of the form. 4. An envelope icon to the right of the 'E-mail (work)' type dropdown. 5. A mobile phone icon to the right of the 'Mobile' type dropdown. 6. A green plus icon to the right of the 'ICQ' type dropdown.

Fields:

Type - various types of contact (eg. E-mail, Skype, ICQ, Facebook, Linked-in, Cell phone, ...)

Contact - field for filling up the phone number, ICQ number, e-mail address ...

Description

Functions:

1. **Collapse/expand** section - by clicking text with black arrow.
2. **Remove** contact information from contact - by clicking the cross (which is red when going your mouse cursor over).
3. **Add** new contact information to contact - by clicking the plus (which is green when going your mouse cursor over).
- 4., 5., 6. **Contact information-specific icon and function**. By clicking this icon you may:
 - a. **write new e-mail** with prefilled recipient,
 - b. **call cell phone/land line** (with using Skype),
 - c. **add ICQ** number to your account,
 - d. **visit facebook/linked-in account**,
 - e. etc.

Mass Mail Subscription

▼ Mass Mail Subscription

☐ Allowed ☐ Forbidden ☒ Unknown

This is usefull section when you are using **mass mailing** system function (see the section `${wiki:Mass mail}`)

Functions:

- By selecting one of the field you tell to system if this contact allowed you to send mass mails (newsletters, promotions, ...) to it.

Groups

▼ Groups

► newsletters

<input type="checkbox"/>	ASB Poland	
<input checked="" type="checkbox"/>	ASB Prague	
<input type="checkbox"/>	ASB Slovakia	
<input type="checkbox"/>	Newsletter	
<input checked="" type="checkbox"/>	VIP	

The Groups name means **distribution groups** which are use to send mass mails to it (see the section [\\${wiki:Mass mail}](#)).

All that fields are **variable**.

Fields:

newsletters - the field with arrow before is category. In the Groups you may categorise your distribution groups.

ASB Poland/Slovakia/Prague, Newsletter, VIP - this is distribution groups as client wants it. By selecting it we are telling taht "this contact will appear in this group and if we are sending mass mail to ASB Prague or VIP we wants its to recieve that message".

Functions:

Confused with how to add or remove distribution group?

- For **adding** new group see the section [\\${wiki:Description/Contact Window}](#).
- For **removing** group contact our support or use windows client.

Bank

▼ Bank **1**

Name:	general CZK acc
Bank name:	Raiffeisenbank a.s.
Bank Code+':'}:	5500
Account Nu...	123456789
IBAN/SWIFT ...	
X 2 variable Sym...	
Constant Sy...	
Specific Sym...	
Comment:	
<input checked="" type="checkbox"/> primary	

+ **3**

Add new bank account eg. for invoicing informations.

Fields:

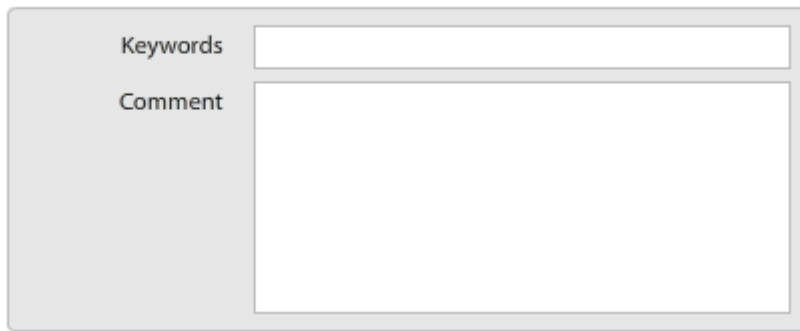
Name
Bank name
Bank Code
Account Number
IBAN/SWIFT
Variable Symbol
Constant Symbol
Specific Symbol
Comment
Primary

Functions:

1. **Collapse/expand** section - by clicking text with black arrow.
2. **Remove** Bank from contact - by clicking the cross (which is red when going your mouse cursor over).
3. **Add** new Bank to contact - by clicking the plus (which is green when going your mouse cursor over).

Comment

▼ Comment

A screenshot of a web form titled 'Comment'. It contains two input fields: 'Keywords' and 'Comment'. The 'Keywords' field is a single-line text box, and the 'Comment' field is a larger multi-line text box.

This section is just for your comments and keywords. It is not too much visible in system and it is not used often.

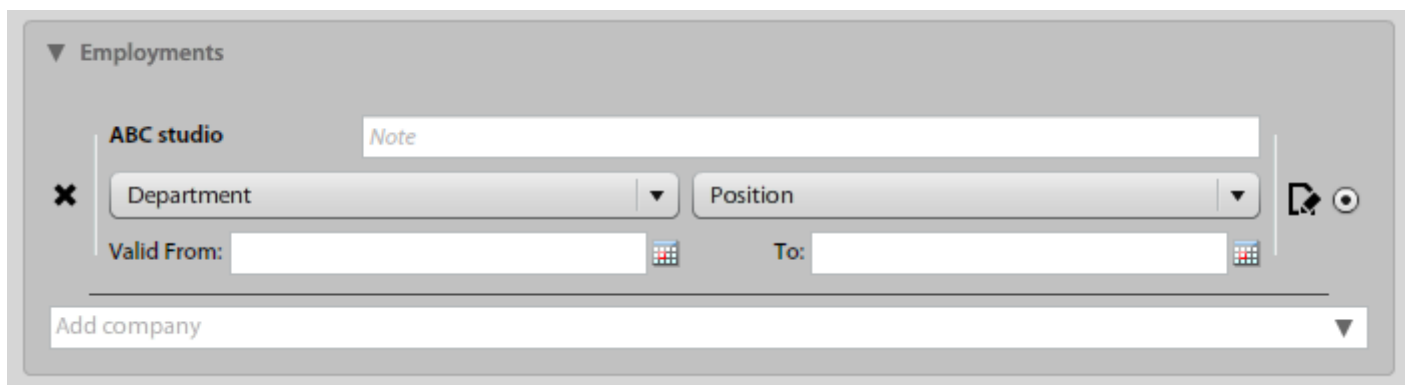
Contact relations

Contact relationship section is divided to two sub sections.

Employees section is for persons related with this company. It might be direct employees or persons which are rented by company. The relation is defined by columns **Position**, **Department**, **Valid from**, **Valid to**.

Companies section is for related companies. The relation is defined by column **Relation**.

Employees/Employments

A screenshot of a web form titled 'Employments'. It features a company selection dropdown with 'ABC studio' selected. To the right is a 'Note' text box. Below these are two dropdown menus for 'Department' and 'Position'. Further down are 'Valid From' and 'To' date pickers. At the bottom is an 'Add company' button.

Fields:

Name - if you are adding new person to that company, you may start writing to this field and the contact will be found.

Position - variable field. Just select if you want to specify person position in selected company

Department - variable field. Just select if you want to specify person department. There might be value External for those person which are rent by this company.

Valid from - time from the person is working in the company.

Valid to - time to the person is working in the company.

Note

Primary

Person 1:1 relations

Functions:

1. **Add new related person** - by clicking the plus icon.
2. **Remove related person** - by clicking the cross icon.
3. **Create new person** - if the person you want to add is no currently in the system you may use this button to create it at fist.
4. **Edit selected person** - click on the one row in table and select person you want to edit. Then click this button to do that.

Companies Relations

Fields:

Name - if you want to add new related company, you may start writting to this field and the contact will be found.

Relation - variable field with **Parent<-->Child** structure. This mean that you may select **Controlling company** or **Division**. So in the collapset section you may see the Controlling company in one way and Divison from the opposite look. See the [Contact relationships - section collapsed](#) to learn about this kind of structure.

Note

Footer - no additional information

Functions:

1. **Cancel** - to close this window without saving.
2. **Next** - to process to next window (which is the fist one you created in the step [Description/New CompanyPerson Window/Contact Types](#))
3. **Save** - to save all changes and close this window.

Contact duplicity checking

System checks for the contact duplicity.

Company

1. The **name** is similar to already created one => Similar contact.
2. The company **registration number** is same as the one already created => Same contact.
3. If the registration number is not entered, the VAT number is checked and must be unique

Person

1. The **first name and the last name** is similar to already created one => Similar contact
2. Persons **e-mail** address or **cell phone** is same as the one already created => Same contact.

Revision #3

Created 21 March 2020 07:36:18 by Jan Safka

Updated 30 March 2023 12:06:51 by Kristýna Eislerová