

Contacts Configuration

Basic Contacts Configuration

Most of the contacts lists are configurable, you can add/remove particular records of the following system fields:

- Language (Preferred communication language)
- Category (Any record, without special meaning)
- Contact Source (Where you got contact from?)
- Contact Address Type (Several base types supported: Invoicing, Delivery, Permanent, Temporary, etc.)
- Contact Type (Contact's relations to organization)
- Contact Information Type (E-mail, phone, mobile, web, LinkedIn, Facebook, Twitter, etc.)
- Groups (Newsletter, etc.)
- Company / Company Relation Types (Mother/Division, Partner/Partner, etc.)
- Company / Person: Department (What department does the person work in?)
- Company / Person: Position (What position does the person work in?)
- Person / Person Relation Types (Parent/Child, Superior/Subordinate, Partner/Partner, Friend/Friend)
- Company Industry (What industries is the company part of?)
- Company Legal Form (What is the company legal form, ie Ltd., SA, Branch Office, etc.)

You can amend most of these lists in MS Windows administration: Settings > Contacts > Configuration, where you can select one of the lists in top left combo selector and add/remove individual records. Please note that it is possible to remove these records only once they were not used previously.

Contact Groups are amended separately in accordeon directly in contacts application (add new Contact Group). In MS Windows client they are referred as Distribution Groups.

Contact Types are configured as Finder's Folder Types, see the Contact Types section below.

Contact Types / Accounts

Contact Type is **role of the contact in relation to the organization**. There are applicable several Contact Types, ie Client, Partner, Employee, etc. In another SW solutions they are called

Accounts.

If Atollon user does not set any Contact Type to the contact, the contact remains in the system only for purpose of storing basic contact information (ie Address, Contact Details, Categorization, etc.). Once the contact becomes organization's Client, Partner, Supplier, etc. - that means the contact (person or company) has some relation to the organization, you should set it's Contact Type.

Set Contact Type

To set Contact Type, you can either open the contact detail and at Contact Type section mark one of the Contact Types or you can drag & drop selected contact(s) into the Contact Type item withing contacts database.

Understanding Contacts & Finder

In order to **get contact into Finder** - that means to **create Finder folder for the contact** (in another words create "Account"), you need to set the contact's Contact Type.

Once you set the contact's Contact Type, there is automatically new **Account** (Finder's Contact Folder) created. There is always one Contact Folder / Account created for each of the Contact Types.

How to configure new Contact Type?

Go to **Context Settings** and create new Folder Type (base type: Contact Folder). *To the date this manual was written, it is not possible to change the Base Type of new Folder Type in web client, it is possible to change it only in MS Win client.* You should also create at least one **Folder Template** and set the initial **status** to the Folder Template. See **Finder Configuration** for more details.

Additional Account Attributes

Each Contact Folder / Account has the following additional attributes:

Account Status

Status indicating whether Client, Partner, Supplier, etc. is currently Potential, Active, Hot, Lost or Not Interested, etc.

Account Responsible User

Each Partner, Client, Supplier, etc. may have one or more **Responsible Users** (sometimes called as Key Accounts as well). The Responsible User is organization's internal responsible person for taking care about the Account (Client, Partner, etc.) Each Responsible User may have different **Role** in relation to the Account (eg. Mr. "Smith" might be "Sales Manager" with company "Acme").

Account Custom Form

If you want to add one or more custom fields to extend information tracked in relation to Account, you may set-up two custom Forms in relation to either Contact Folder Type or Contact Folder Template. General folder (available for all Accounts of the same type) should be set to Contact Folder Type. See more information at Finder Configuration on how to add Form to Folder Type.

Example

You want to prepare your contact database to **segment your customers database** with additional details that are not standard part of Atollon set-up.

You might want to add:

- Special product categories (Form: **List Field**)
- Date fields indicating important deadlines (Form: **Edit Field** with **Date** constraint)
- Importance of the client (Form: **Combo Field**)
- Client's yearly turnover (Form: **Edit Field** with **Numeric** constraint)
- Indication that client signed contract (Form: **Checkbox**)
- Indication of date when client signed contract (Form: **Edit Field** with **Date** constraint)
- Clients interests (Form: **Memo Field**)

Contacts & Users

It is possible to create new contact with new user account as well. In order to do this, you need to have the following entities prepared:

- User Template
- Finder's Folder Type
- Finder's Folder Template

New user account is usually a person contact. There is one person contact with user account creation pre-configured in basic template. It is called "Employee". Once you create new Employee, new Contact + User + Contact Folder (Employee) is created.

Once you create new **User Template**, Finder's **Folder Type** & **Folder Template**, edit Folder Template settings in MS Windows client and select User Template for the Folder Template (called Subject Template in MS Win client under Account & Project Settings).

You can create new User Template in MS Windows client: Settings > Access > User Template.

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