

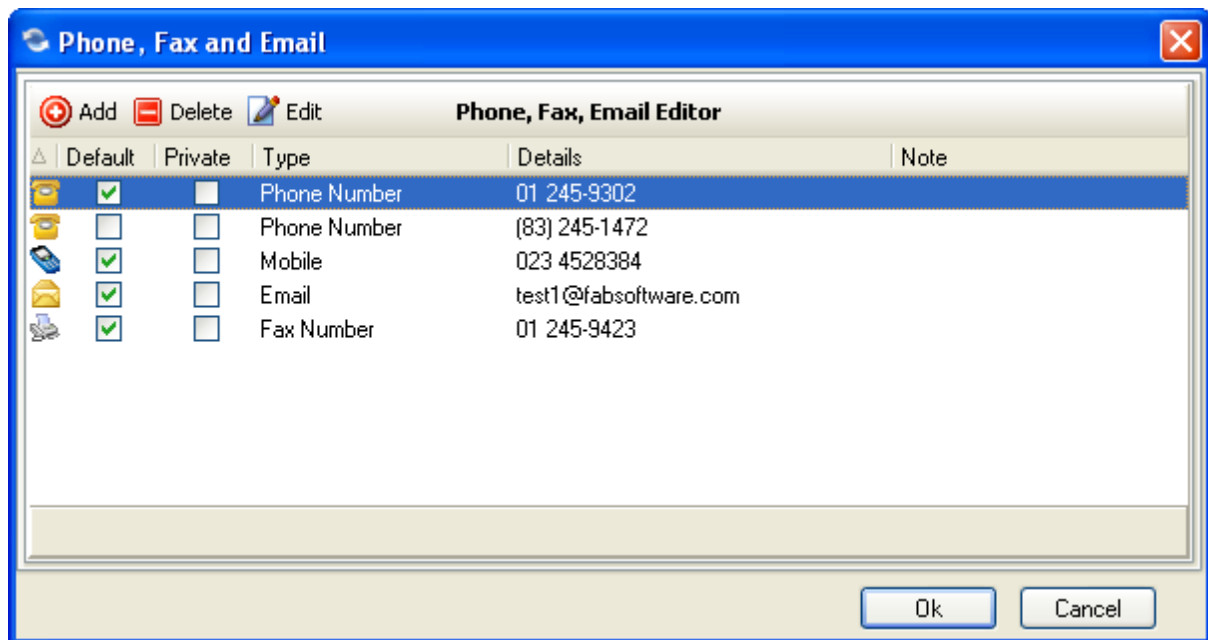
Address and Phone Editor

Forté CRM can store an unlimited number of addresses, phone numbers and emails for each contact or account. Mobile phone numbers, website addresses and Skype addresses can also be held.

To keep the database consistent, avoid duplication, and improve efficiency, phone and address details should only be entered once. For example, an address can be set up for a business as an account, and then all contacts from that business should have the address copied from the account when they are set up, rather than re-entering the same address.

Phone, Fax and Email

Telephone, fax and email details are added or edited using the Phone, Fax and Email Editor.



To edit existing details:

- Click on a particular entry to highlight it, then click the 'Edit' button. Alternatively, an entry can be selected by double clicking on it.
- The Edit Phone, Fax, Email screen containing the details for the selected entries displayed.
- Change the details as required (see below for descriptions of each field).
- Click Ok to effect the change.

Editing linked phone details

When you change or delete a phone number or email address, a list of all contacts and accounts that use the same phone or email details will be displayed. Forté CRM will ask if you wish the change you have made to apply to every linked contact and account that uses the same phone details, or only to the currently selected contact or account. Select 'Yes' to update or delete the details for all contacts or accounts. Select 'No' to update or delete only the selected contact or account.

To add new details:

- Click the 'Add' button.
- A blank Edit Phone, Fax, Email screen is displayed.

Type Click on the arrow to select the type of details to be entered. Available options are Phone Number, Mobile, Fax Number, Email, Website and Skype Address.

Phone Number The description of this field changes to reflect the type selected. Enter the phone number, email address etc.

Note A text field to record any information regarding this number. For example, Do not call after 7pm.

Default Each phone and email type can be specified as the 'default' for that type. If a contact has several email addresses, the email address specified as the default will be used in document merging wherever you specify the email address merge symbol for that contact.

Private A number such a home phone number can be designated as private. This will then be listed as a private number on the contact details screen.

- Enter the required details in each field.

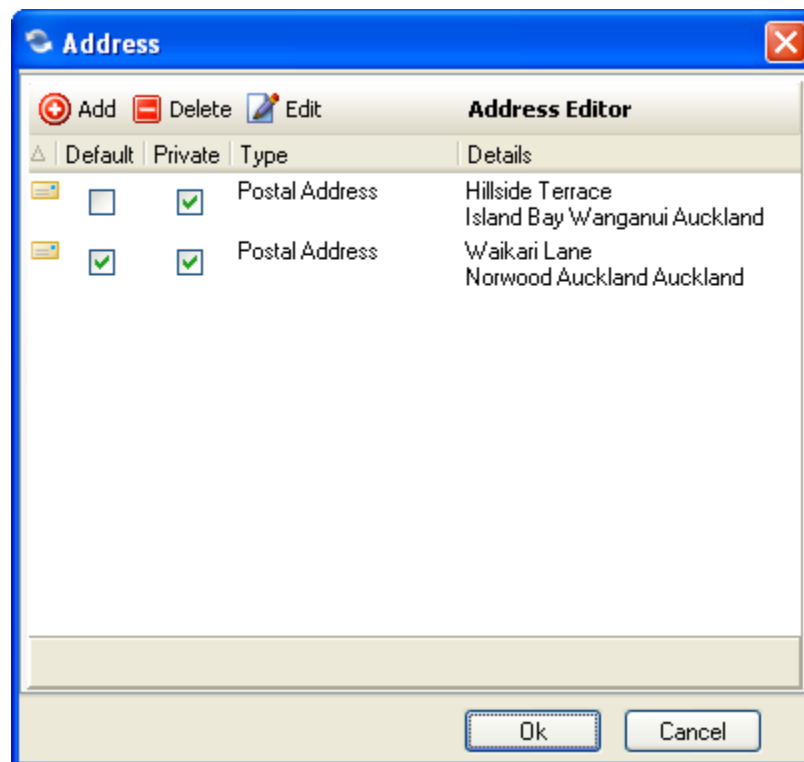
- Click Ok to create the contact details entry.

To delete details:

- Click on a particular entry to highlight it, then click the 'Delete' button to remove the entry.
- Confirm the delete for only the selected entry by clicking on 'No' or for all linked contacts and accounts by clicking 'Yes'.

Address

Address details are added or edited using the Address Editor.



To edit existing details:

- Click on a particular entry to highlight it, then click the 'Edit' button. Alternatively, an entry can be selected by double-clicking on it.
- The Address Editor screen containing the details for the selected entry is displayed.
- Change the details as required (see below for descriptions of each field).

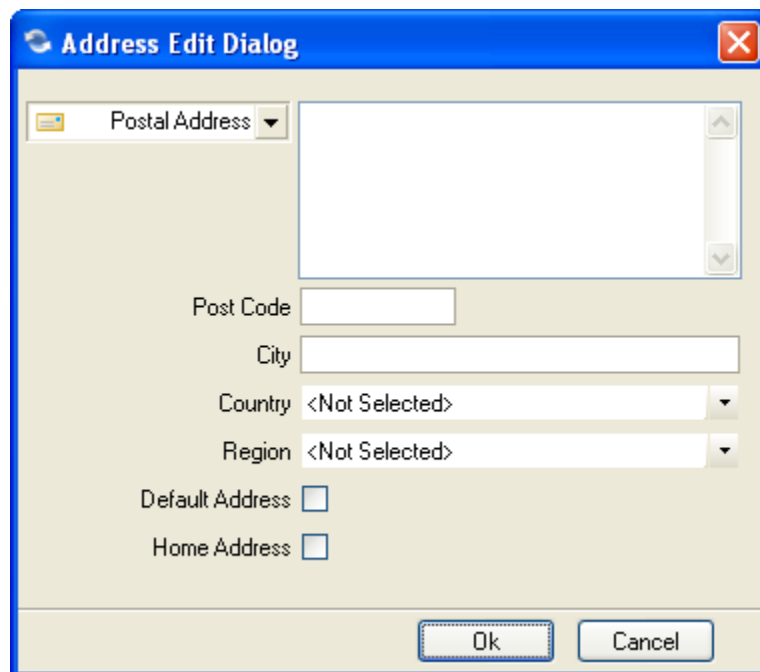
- Click Ok to effect the change.

Editing linked address details

When you change or delete addresses, a list of all contacts and accounts that use the same address details will be displayed. Forté CRM will ask if you wish the change you have made to apply to every linked contact and account that uses the same address details, or only to the currently selected contact or account. Select 'Yes' to update or delete the details for all contacts or accounts. Select 'No' to update or delete only the selected contact or account.

To add new details:

- Click the 'Add' button.
- A blank Address Edit screen is displayed.



Type Click on the arrow to select the type of address details to be entered. Available options are Postal Address, Physical Address and Courier Address.

Address Enter the street and suburb.

Post Code Enter the post code.

City Enter the city.

- Country** Select the country from the drop down box, or <Not Selected> to leave this blank.
- Region** Select the region from the drop down box, or <Not Selected> to leave this blank.
- Default Address** One address can be specified as the 'default' address. The default address is usually a postal address and is the address used in document merging.
- Home Address** Checking this address will designate the address as private. This will then be listed as a private address on the contact details screen.

- Enter the required details in each field.
- Click Ok to create the address details entry.

To delete details:

- Click on a particular entry to highlight it, then click the 'Delete' button to remove the entry.
- Confirm the delete for only the selected entry by clicking on 'No' or for all linked contacts and accounts by clicking 'Yes'.