

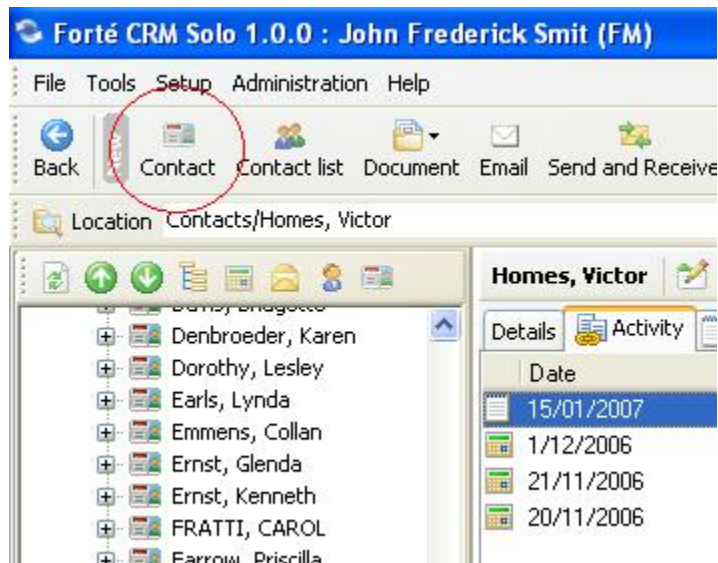
Create a Contact

A Contact is any person with whom you interact, such as a customer, client, supplier or friend. Adding a contact to the Forté CRM database allows you to record a full history of any interaction (phone calls, meetings, notes, documents, etc.) you may have with that person, and gives you the ability to manage the relationship in an organized manner.

Step 1: Launch the New Contact Wizard

If the new contact is associated with an existing account, select the account in the tree view. This will set up a link between the contact and the account and will allow address details for the account to be used for the contact.

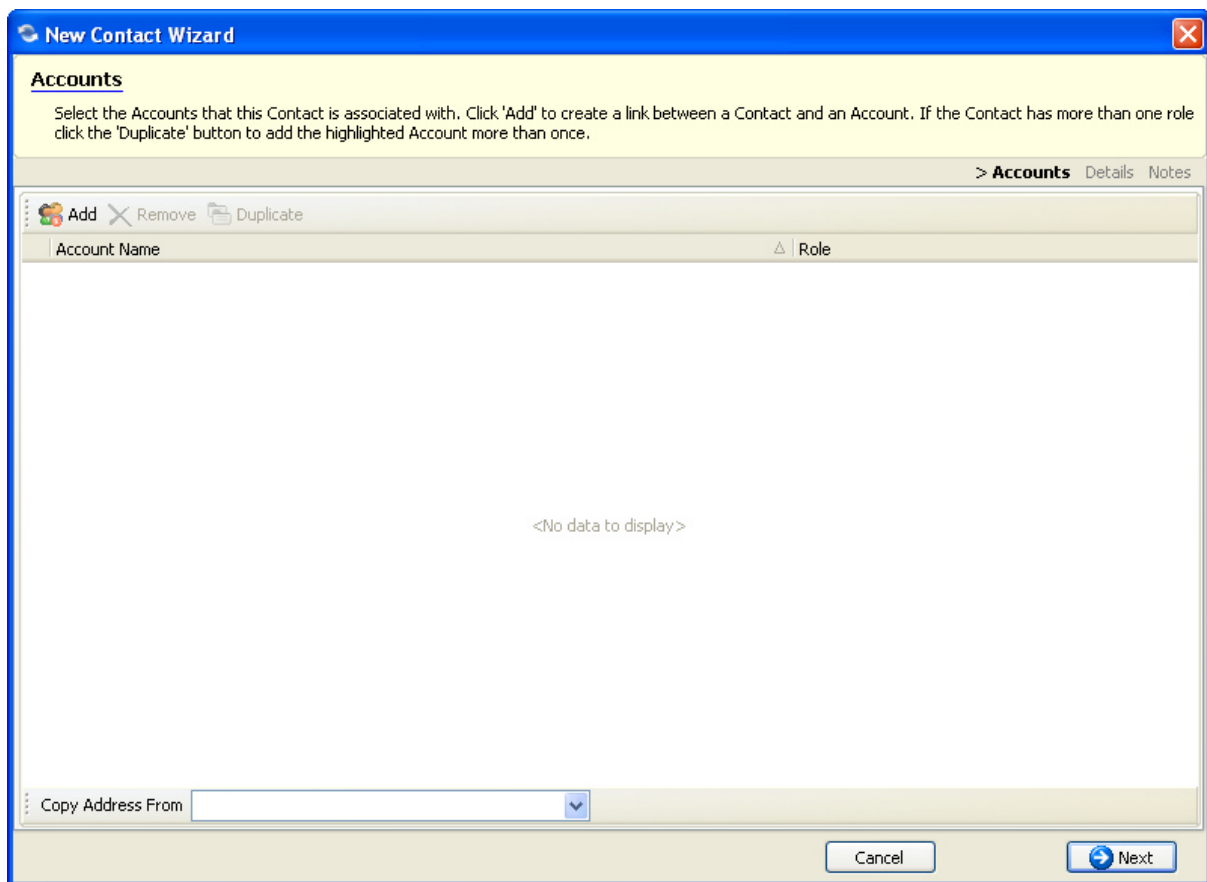
To create a new Contact, click on the 'Contact' button at the top of the screen.



The 'New Contact Wizard' screen will be displayed.

If you are using a version of Forté CRM with the Accounts module, the first page of the wizard will allow you to select one or more accounts to link the contact to. If you do not have the Accounts module, go to Step 3.

A contact does not have to be associated with an account. To enter details for a contact that is not linked to an account, click on 'Next' at the bottom of the screen, and select 'Yes' to confirm that no account has been selected. Go to Step 3.



Step 2: Linking the Contact to an Account

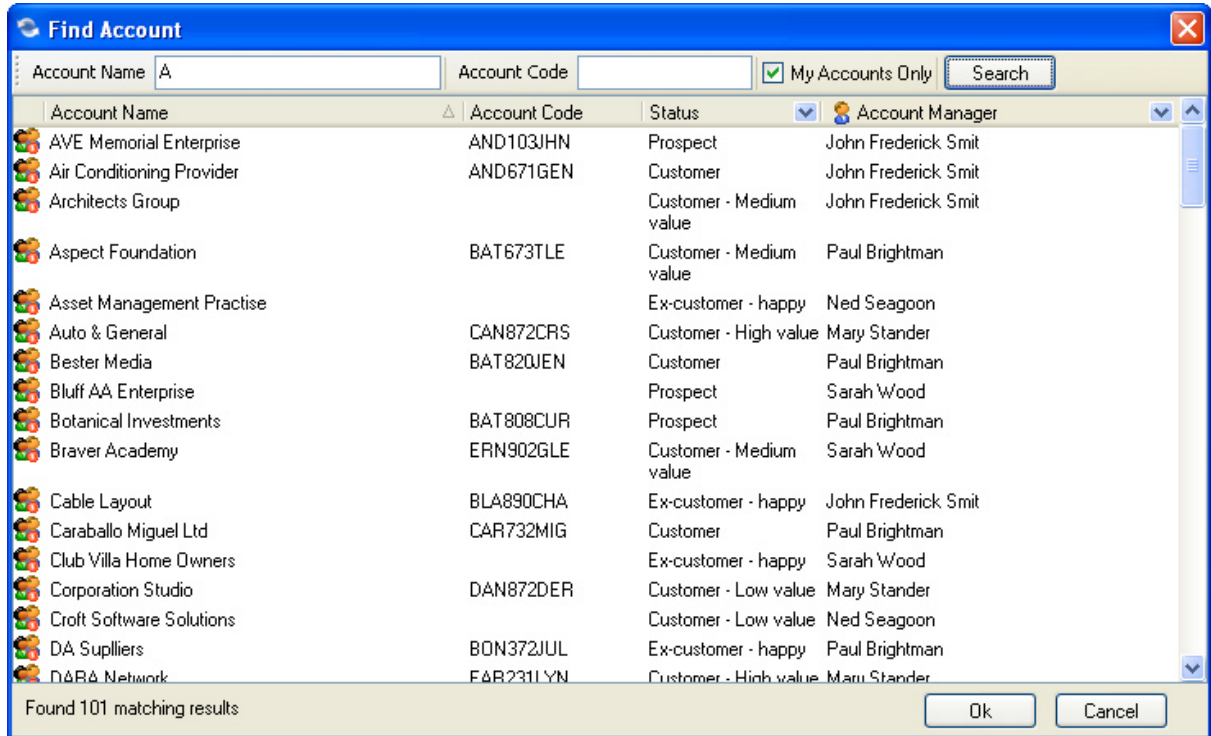
A contact is often associated with an account. An account is a business, department, portfolio or other organizational structure, that allows a logical grouping of contacts.

Selecting Accounts that this New Contact is associated with

If an account was previously selected, it will be displayed on the accounts screen. If no account is shown, or you wish to link another account to this contact, select the account as follows:

- Click the 'Add' button on the New Contact Wizard. The 'Find Account' screen is displayed.
- If the account belongs to another account manager, uncheck the 'My Accounts Only' box.
- Enter part of either the account name or the account code in the appropriate box, and click the 'Search' button. A list of accounts matching the search criteria will be displayed.

- Double click on the appropriate account to select it, or alternatively click on an account and then click Ok.



The selected account will be shown on the New Contact Ward Accounts screen, and a link will be created between the contact and this account.

Role

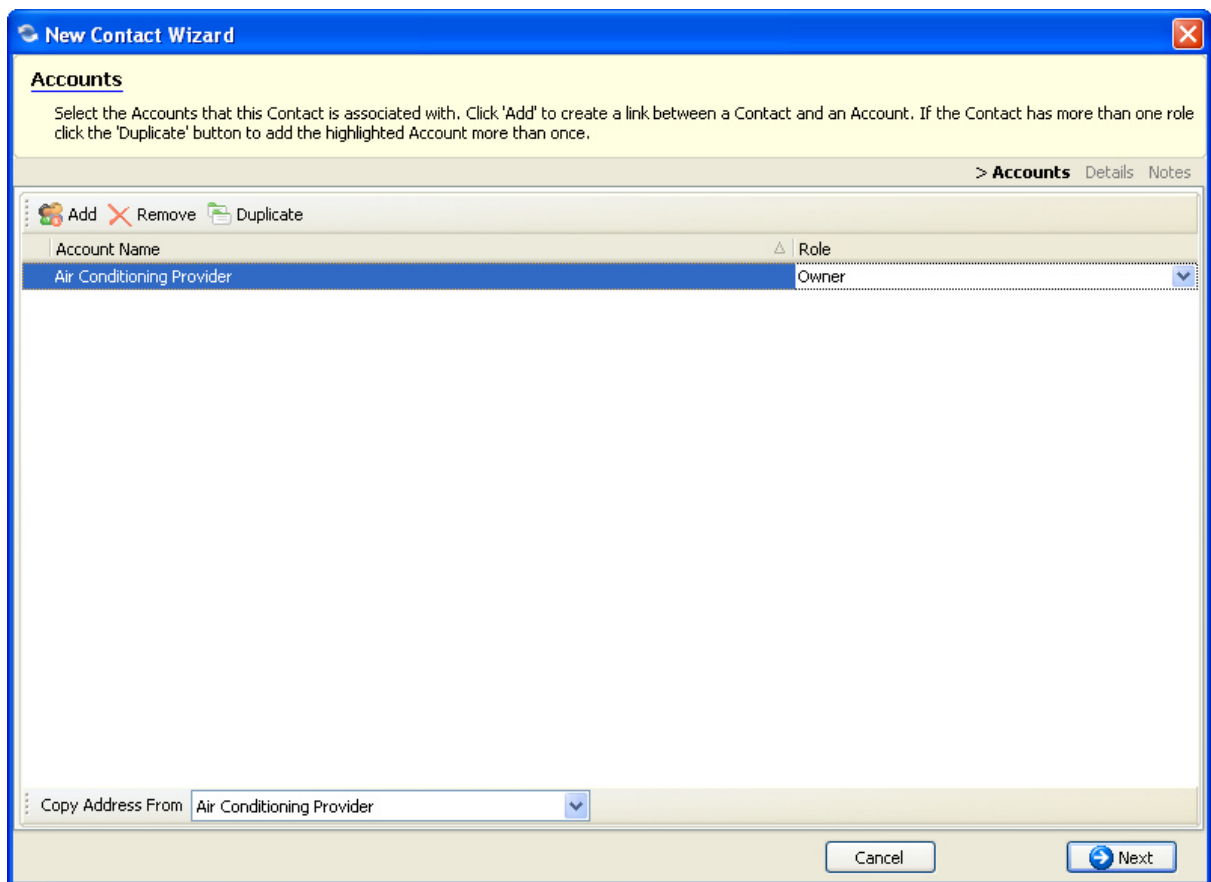
Each link from a contact to an account is qualified by a 'Role'. A role refers to the function, from your perspective, that the contact has within the account. Common roles are Manager, Personal Assistant, Invoicing Contact, etc.

Click on the drop down box under the Role heading and select the role of this contact from the listed options.

If the contact has more than one role within the same account, click the 'Duplicate' button to copy the account, and use the drop down box to select another role.

Multiple Accounts

A contact may be linked to more than one account. Follow the procedure listed above to select one or more further accounts to link this contact to.



Copy Address From

At the bottom of the screen you can select an account to copy the address details for the new contact from. This enables all contact details, such as address, phone, and email, that have been set up for the account to apply to the contact.

Some of these copied details may be edited or deleted, and personalised contact details such as mobile phone numbers added, on the following Contact details screen. Using the copy feature means you only have to enter each address into the database once.

Click on the drop down box to select one of the linked accounts listed above, select <Search> to copy address details from a different (non-linked) account, or select <None> to enter new address details.

Click the 'Next' button to continue.

Step 3: Enter New Contact Details

New Contact Wizard

New Contact Details

Enter name and address details below. Fields in bold are compulsory. You can record as many phone numbers, email addresses, physical addresses, etc as you require. Click the 'Add' buttons in the 'Phone and Email' and 'Address' tabs to add more items

Accounts > **Details** Notes

Title:

First Names:

Surname:

Known As:

Initials:

Other Details Categories

Mailing Name:

Status: Active

Occupation:

Gender: Not specified D.O.B:

Phone, Fax, Email Editor

Default	Private	Type	Details	Note
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Phone Number	01 245-9302	
<input type="checkbox"/>	<input type="checkbox"/>	Phone Number	(83) 245-1472	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Mobile	023 4528384	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Email	test1@fabssoftware.cc	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Fax Number	01 245-9423	

Address Editor

Default	Private	Type	Details
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Postal Address	Hillside Terrace Island Bay Wanganui Auckland
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Postal Address	Waikari Lane Norwood Auckland Auckland

Cancel Back Next

Enter name and address details for the contact. Most fields are optional, allowing you to add a Contact for whom you do not yet have full details. Fields shown in bold type are required.

Known As Defaults to First Names but can be changed by entering the preferred name.

Mailing Name Defaults to First Names plus Surname but can be changed.

Status Select current status of the Contact such as Active, Lead etc.

Categories Click on the 'Categories' tab behind 'Other Details' to specify a category or categories to classify the contact. Categories can include High Value Client, Active Prospect, Bad Debtor, Friend, etc. Categories are created using the Setup → Categories option at the top of the main Forté CRM screen.

Phone, Fax, Email Address Telephone, fax, email and address details copied from a linked account will be displayed. These can be changed, and new contact details added, using the 'Phone, Fax, Email Editor' and the 'Address Editor'.

Click the 'Next' button to continue.

Step 4: Enter User Defined Data

If you have set up fields to contain your own specific information on contacts (for example, Members in Household), the next screen of the New Contact Wizard will allow you to enter these details.

Click the 'Next' button to continue.

Step 5: Enter General Notes

This screen allows you to enter any further information about the contact in a plain text format. This might include a comment about parking arrangements at the office, or some personal details you wish to have available. Details entered are accessed, and edited, from the General Notes tab for the Contact.

Click the 'Next' button to continue.

Step 6: Save the New Contact Details

Click the 'Save' button at the bottom of the General Notes screen. The new contact is added to the database.

Click 'Close' to exit the New Contact Wizard, or 'Repeat Wizard' to add another new contact.

The new contact will be shown under Contacts in the treeview and also under any of the accounts they are linked to.