Linking Contacts to Accounts

A contact s often assoc ated w th an account. An account s a cl ent, portfol o, bus ness, department, or other organ sat onal structure, that prov des a log cal group ng of contacts.

A contact ma   be l nked to more than one account. There s no l m t to the number of accounts that a contact can be l nked to, and there s no l m t to the number of contacts that can be l nked to a s ngle account.

Each l nk from a contact to an account s qual f ed b   a role. A role refers to the funct on, from   our perspect ve, that the contact has w th n the account. For example, G na Gogetter (a Contact) ma   be the IT Manager (a role) for Meganat onal Corporat on (an Account), but she ma   also be the owner (another role) for Gogetter Flowers (another Account). Common roles are Manager, Personal Ass stant, Invo c ng Contact, Sol c tor, etc. Forté CRM comes w th common roles alread   set up but other roles can be added us ng the Adm n strat on funct on.

Creating a link between a contact and an account

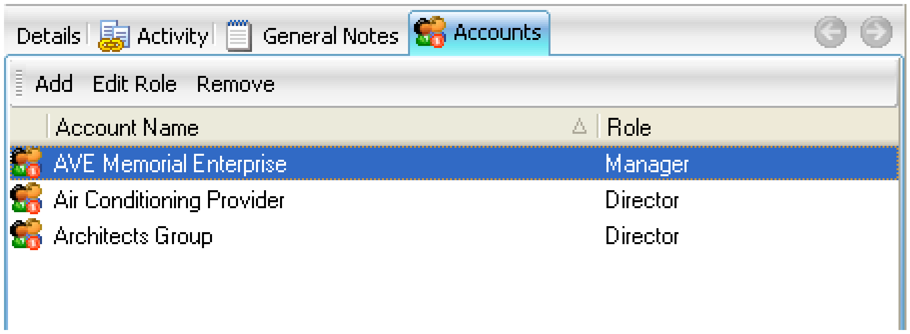
The usual process for add ng a cl ent to the Forté CRM database s to create the new account f rst, and then create each of the contacts assoc ated w th the account. Each contact w ll then be l nked to the account when the   are created. Th s enables the address and other account deta ls to be cop ed from the account for each contact (as requ red) w thout hav ng to re-enter them each t me.

A new contact can be l nked to an ex st ng account when the contact s created. (see Create a Contact).
An ex st ng contact can be l nked to a new account when the account s created (see Create an Account).
Ex st ng contacts and accounts can be l nked at an   t me. An add t onal l nk, qual f ed b a new role, can be added for a contact alread   assoc ated w th an account.

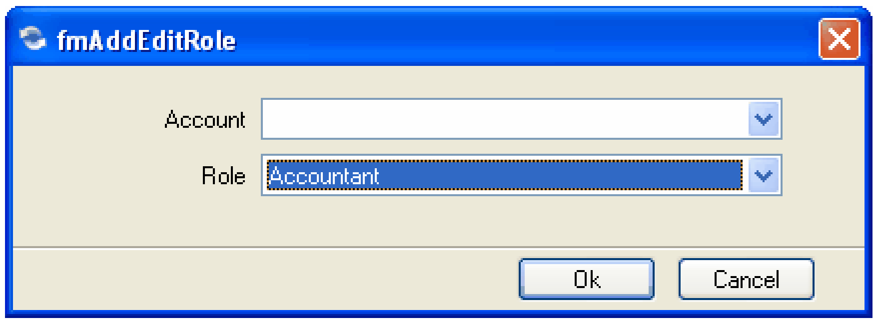
A l nk between a contact an account can be set up b   select ng e ther the contact or the account to be l nked. Wh chever d rect on the l nk s set up from, the end result s the same. The l nked account w ll be shown on the Accounts tab for the contact, and the contact w ll be shown on the Contacts tab for the account.

T   l nk   m a C ntact t   an Acc unt:

Select the contact, e ther n the treev ew or from the contacts gr d. Cl ck on the Accounts tab for the contact to v ew the l st of accounts that the contact s l nked to. The deta ls of an   account can be d spla   ed b   double cl ck ng on the selected account.



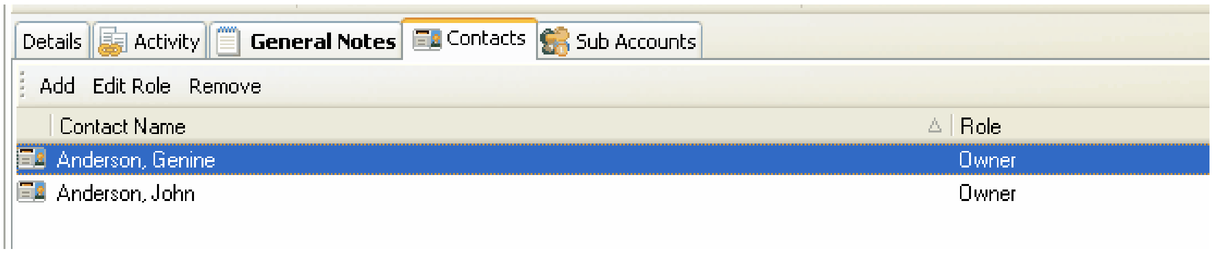
To l nk th s contact to an account, or to add another role w th n an ex st ng account, cl ck on the 'Add' button. The follow ng screen s d spla ed:



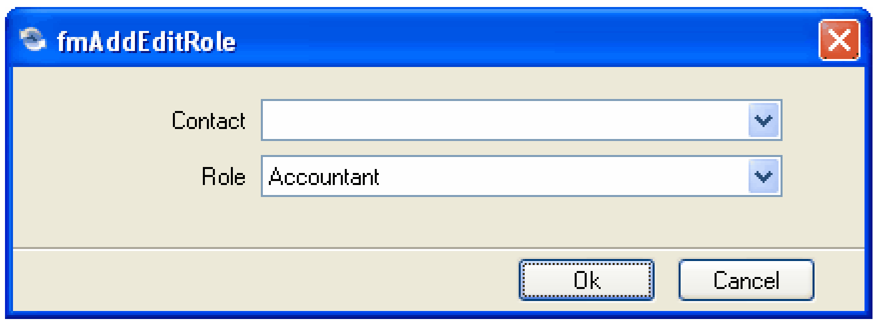
- Select <Search> from the Account drop down box. The 'F nd Account' screen s d spla ed.
- If the Account belongs to another account manager, uncheck 'M Accounts Onl '.
- Enter part of e ther the account name or the account code n the appropr ate box, and cl ck the 'Search' button. A l st of Accounts match ng the search cr ter a w ll be d spla ed.
- Double cl ck on the appropr ate account to select t, or alternat vel cl ck on an account and then cl ck Ok.
- Cl ck on the drop down box under the Role head ng and select the role of th s contact from the l sted opt ons.
- Cl ck Ok to l nk the contact to the account.
- Cl ck the 'Add' button aga n to l nk further accounts to th s contact.

T l nk m an Acc unt t a C ntact:

Select the account, e ther n the treev ew or from the accounts gr d. Cl ck on the Contacts tab for the account to v ew the l st of contacts l nked to th s account. The deta ls of an contact can be d spla ed b double cl ck ng on the selected contact.



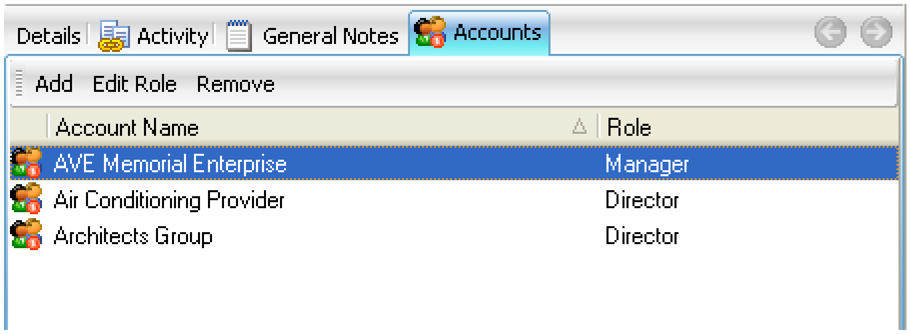
To l nk th s contact to an account, or to add a new role w th n th s account for the contact, cl ck on the 'Add' button. The follow ng screen s d spla ed:



- Select <Search> from the Contact drop down box. The 'F nd Contact' screen s d spla ed.
- If the Contact belongs to another Account Manager, uncheck 'M   Contacts Onl '.
- Enter part or all of the contact's f rst name and cl ck the 'Search' button. A l st of contacts match ng the search cr ter a w ll be d spla ed.
- Double cl ck on the appropr ate contact to select them, or alternat vel   cl ck on a contact and then cl ck Ok.
- Cl ck on the drop down box under the Role head ng and select the role of th s contact from the l sted opt ons.
- Cl ck Ok to l nk the contact to the account.
- Cl ck the 'Add' button aga n to l nk further contacts to th s account.

To change the role of a Contact within an Account:

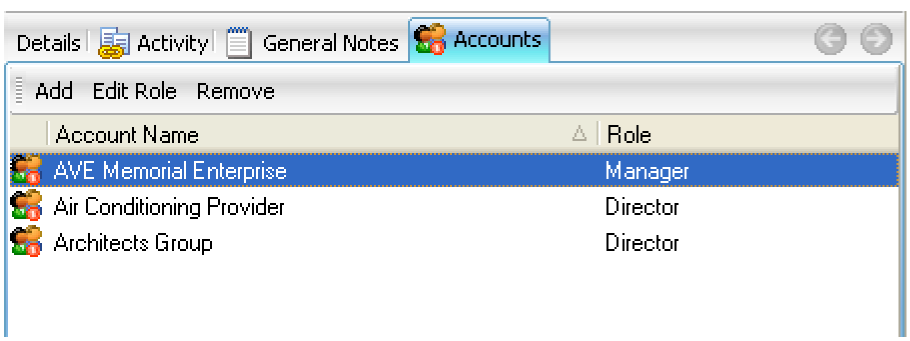
- Select the contact, e ther n the treev ew or from the contacts gr d.
- Cl ck on the Accounts tab for the contact to v ew the l st of accounts that the contact s l nked to.



- Cl ck on the requ red account to select t. The selected account w ll be h ghl ghted.
- Cl ck the 'Ed t Role' button.
- Select the new role from the drop down box.
- Cl ck Ok to update the l nk.

To remove a link between a Contact and an Account:

- Select the contact, e ther n the treev ew or from the contacts gr d.
- Cl ck on the Accounts tab for the contact to v ew the l st of accounts that the contact s l nked to.



- Select the account to be deleted b   cl ck ng on t. The selected account w ll be h ghl ghted.
- Cl ck the 'Remove' button.
- Cl ck Yes to conf rm that the account l nk s to be removed from th s contact. **N te** The account tself s not deleted. Delet ng a l nk removes onl   the l nk between the contact and the account.