

Working with Contacts

Selecting a Contact

To select a contact to work with, click on their name in the treeview on the left or double click on their name in the contact grid. When a contact is selected various tabs, containing information about the contact, are available. More tabs may be available depending on which modules have been loaded.

- Data s** Contact information such as name, address, status etc.
- Act ty** This shows all appointments, tasks, notes, documents and events filed against the contact.
- General Notes** A plain text field to record any other information about the contact.
- Accounts** This shows all accounts related to this contact and their role within each account.

Editing a Contact

- On the Details tab for the contact, position the cursor over the description of the field to be changed. This will highlight and underline the selected field.
- Click on the highlighted item to edit the corresponding details for this contact.

The screenshot shows the contact details for Mrs Genine Anderson. The 'Status' field is circled in red, and a red text annotation says 'Click on status to edit the status'. A 'Status' dialog box is open, showing a dropdown menu with 'Active' selected. The dialog box has 'Ok' and 'Cancel' buttons.

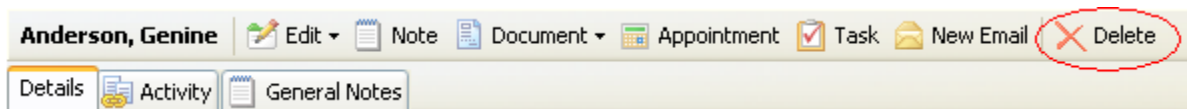
Known As:	Genine
Initials:	
Status:	Active
Occupation:	Nurse
Gender:	Female
Date of Birth:	11/08/1976
Mailing Name:	Mrs Genine Anderson
Default Private Postal Address:	Waikari Lane, M
Default Email:	test1@fabsoftw
Default Phone:	01 245-9302
Default Fax Number:	01 245-9423
Default Mobile:	023 4528384
Private Postal Address:	Hillside Terrace, Island Bay, Wanganui, Auckland, New Zealand, Post Code :0008
Phone:	(83) 245-1472
Categories:	

- Enter the new details and click Ok to effect the change.

Alternatively, contact details can be edited by clicking the Edit button and selecting the item to be changed from the drop down list. **Note** To minimise screen clutter, contact detail fields are not shown if they do not contain any information. These fields can be accessed by clicking the Edit button.

Deleting a Contact

Subject to permissions, a Contact can be deleted by clicking the 'Delete' button.



Activity List

The activity list is a history of all interaction with the contact. It shows the date, activity type (note, document, email, appointment, etc.) and who in your organisation entered the details of the item. Double click on an item in the activity list to view or edit it (subject to permissions). See Activity Lists for more details.