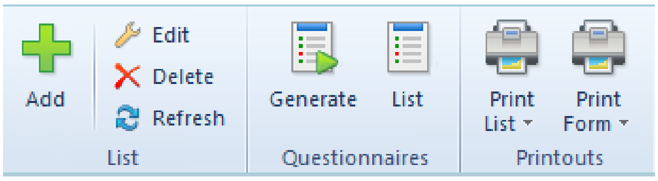
List of contact persons

The list of contact persons contains information about contact persons in a company. Each contact person can be assigned to particular customers. To open the list of contact persons, it is necessary to go to the *Main* menu and then, from *Directories* list of buttons, select [**Contact Persons**] button.

The menu of the list of contact persons cotains <<standard buttons>> allowing for adding new items and editing them, as well as menu of printouts. Upon marking an item on the list, options related to <<generating questionnaries>> appear in the menu.

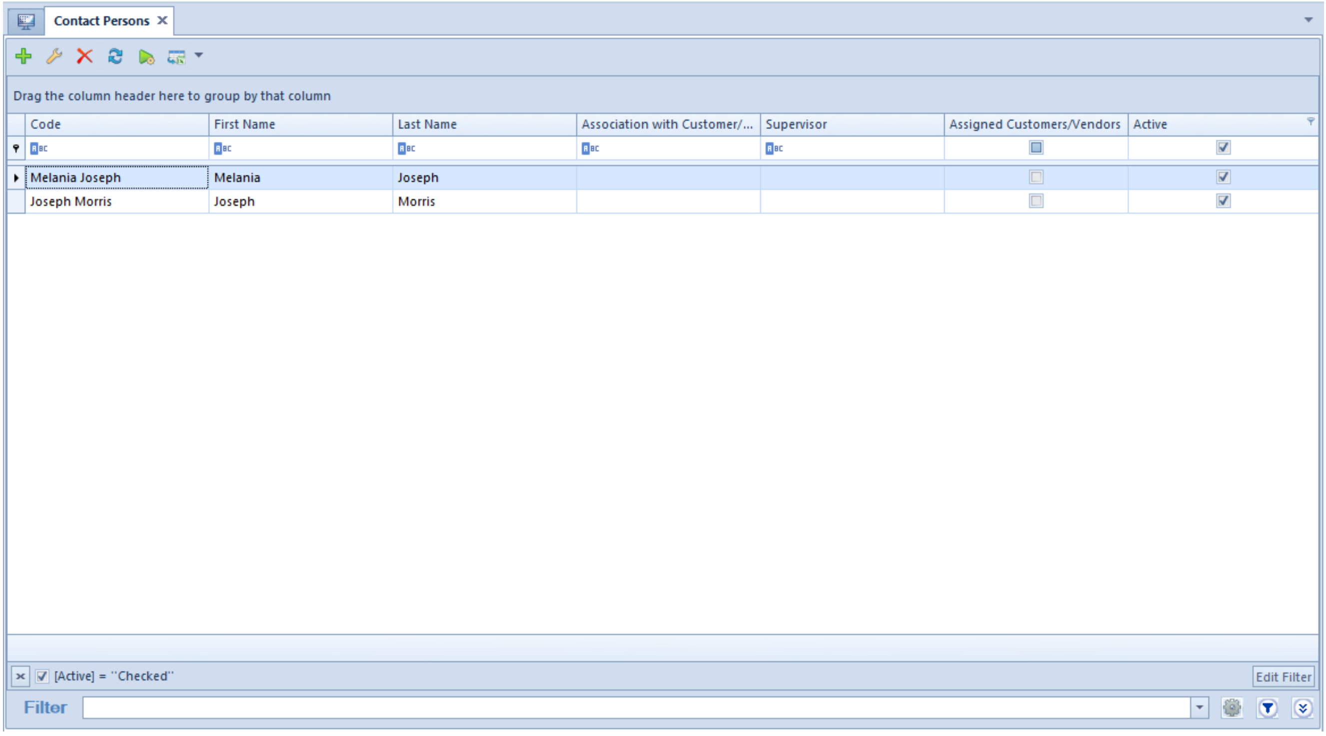


Menu of the list of contact persons

The list of contact persons is composed of the following comlumns:

- **Code**
- **First Name**
- **Second Name**
- **Association with Customer/Vendor** – position/family relationship, depending on the customer's/vendor's status
- **Supervisor** – customer/vendor or employee associated with a given contact person
- **Assigned Customers/Vendors** – parameter informing whether there are customers/vendors assigned to a given contact person
- **Active** – if the parameter is checked, a contact person can be used in the system

- **WWW** (hidden by default) – contact person's website



List of contact persons

Defining contact person

General information

A new contact person can be added by clicking on [**Add**] button placed in the main menu or ergonomic panel above <<the list of contact persons>>. It opens a form of newly created contact person divided into the following tabs: *General*, *CRM DATA*, *Attributes* and *Attachments*.

Tab General

The tab *General* contains the following fields and parameters completed by the user:

- **Code** – mandatory field. This is the only field which must be completed to be able to save a contact person in the system.
- **Title** – drop-down list, contains predefined values and *Mrs.* The user can define new titles in generic directory *General → Titles.*
- **Title** – drop-down list, contains predefined *Dr.* and *Prof.* The user can define new academic titles in generic directory *General → Academic Titles.*
- **Date of Birth**
- **WWW**
- **Active**

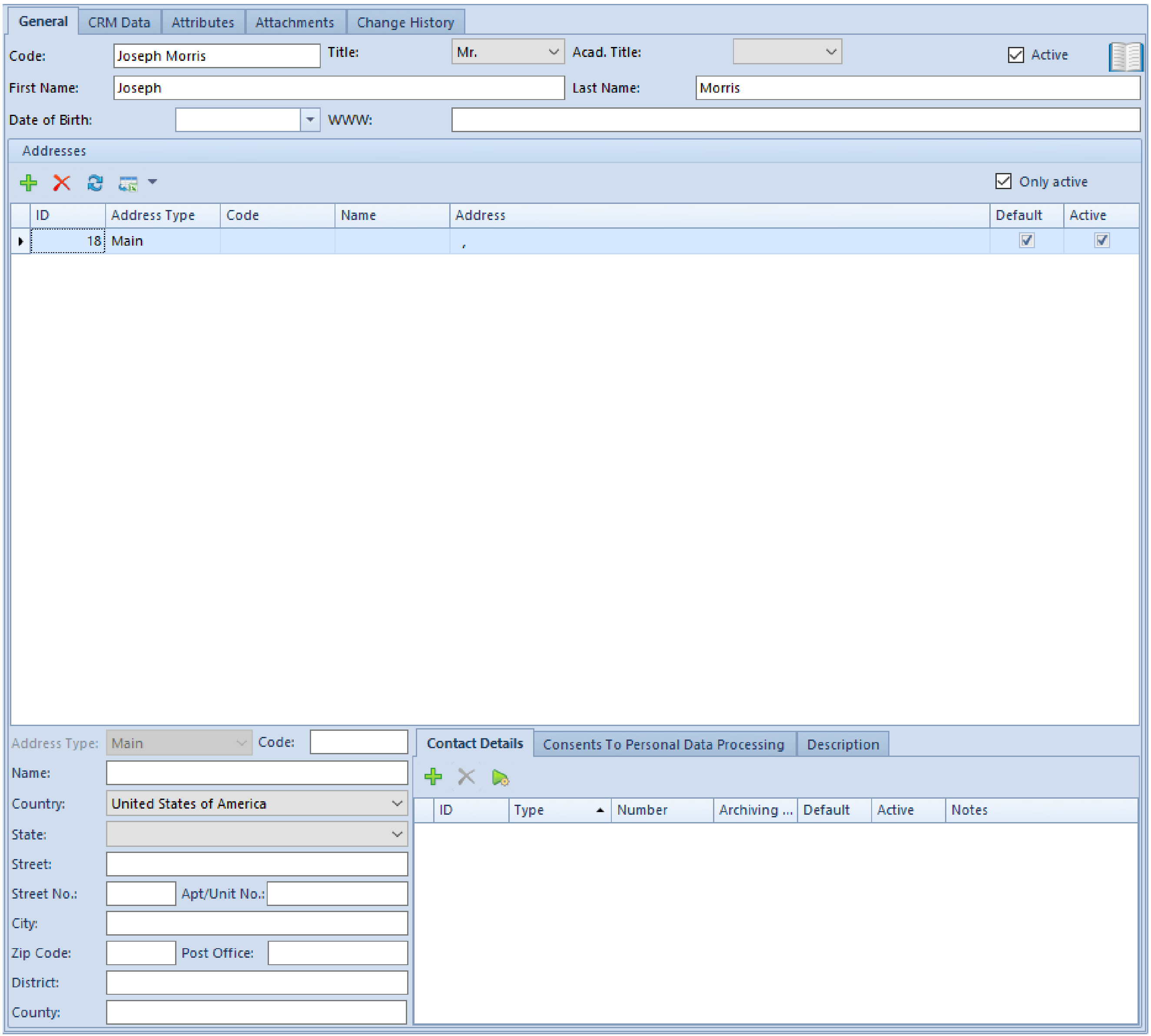
In the section *Addresses,* it is possible to add contact person's addresses. The following types of addresses are available:

- **Main**
- **Delivery**
- **Subsidiary**
- **Mailing**
- **Billing**
- **Residence**

The list of addresses contains default address of *Main* type generated by the system and it can be freely modified by the user, however it cannot be deleted. The user can add any number of contact person's addresses but only one of them can be marked as default. If the parameter *Active* placed next to an address is checked, it means that such address can be used in other places of the system. Addresses can be deactivated (archived) manually by unchecking the parameter *Active.* An address marked as default for the main type cannot be deactivated or deleted. Also, the addresses which have already been used in the system (e.g., on a document) cannot be deleted.

Note
Deactivation of an address is irreversible.
Subtab *Contact Details* contains contact data of a contact person (e.g., phone number, e-mail, messenger) and allows for adding it for each address.

Subtab *Consent To Personal Data Processing* contains the list of consents to processing of contact person’s personal data and allows for adding them. Consents to personal data processing are described in <<article>>.



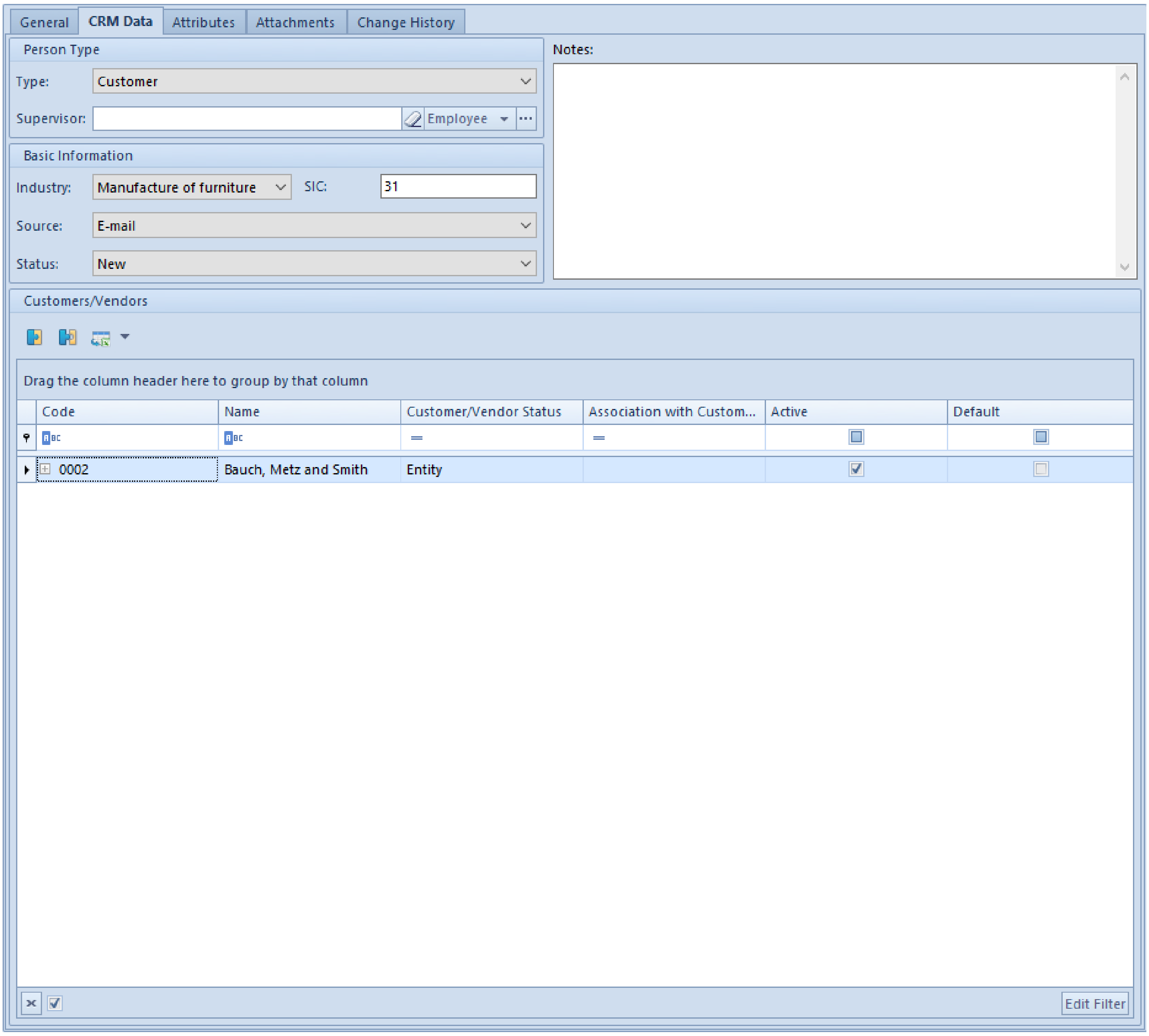
Tab General on contact person form

Tab *CRM Data*

The tab *CRM Data* contains the following fields:

- **Type** – drop-down list containing predefined values: *Customer, Lead, Partner, Prospect.* The user can also define new types in generic directory *CRM → Type.*
- **Supervisor** – field allowing for selecting a commercial supervisor for a contact person from among customers/vendors or employees available in the system
- **Industry** – drop-down list allowing for indicating the industry in which contact person operates. The user can also define new industries in generic directory *CRM → Industries.*
- **SIC** (Polish Classification of Activities) – inserting an appropriate number of SIC causes that the system selects an industry corresponding to it in the field
- **Source** – drop down list allowing for selecting contact person acquisition source. The user can also define new sources in generic directory *CRM → Source of Origin.*
- **Status** – drop-down list allowing for selecting the status of opportunities of a contact person. The user can also define new statuses in generic directory *CRM → Opportunity Status.*

In section *Customers/Vendors* it is possible to indicate customers/vendors with which a given contact person is associate and to select type of such association, depending on customer's/vendor's status.



Tab CRM Data on contact person form

Other tabs

Detailed description of the tabs *Attributes* and *Attachments* can and *History* be found in article <<Tab Discount Codes, Analytical Description, Attributes, Attachments and Change History>>.