2.01.20 Contact Person

The mask contact persons manages all contact persons of the assigned contacts. Information about the department and function of the contact person and the communication possibilities are defined here. A different company address can also be defined in the mask.

The mask consists of the following elements:

General Data

- **Basic Information:**
    - **Contact:** This field refers to the contact person's company.
    - **Type:** In the Type field, you can assign the employee relationships of the contact person (for example, external employee, permanent employee, freelancer, contractor, and so on) that are defined in the Collections (see Administration Guide).
    - **Form of Address, Title, Name and First Name:** These fields indicate the form of address and/or the title as well as the first and last name of the contact person.
    - **Department and Function:** The department and function of the contact person can be entered in these fields.
    - **Blocked, Reason for Blocking:** This checkbox allows you to lock the contact person for further use in the system (project, contract). The reason can be entered in the Lock reason field (for example: no longer employed in this company).
    - **Note:** This field is used to enter remarks about the contact person.

- **Address:**
    - **Address, Postcode, City and Country:** These fields indicate the complete (business) address of the contact person.
    - **Phone, Fax, Mobile and e-mail:** These fields indicate the contact person's availability by telephone (office and mobile), fax and e-mail. Clicking on the e-mail address opens the user's standard mail program with the entered e-mail address.
- **Photo:** A photo of the contact person can be uploaded here.

History

- **Actions:** This element contains all assigned actions for the contact person. The actions are managed in the mask action.
- **Campaigns:** All campaigns that have selected the defined contact person as the target group are transferred here. The campaigns are managed in the campaigns mask.
- **Meetings:** This element contains all information about meetings.
- **Dates:** This element contains all assigned dates for the contact person. The actions are managed in the appointment calendar.

Details

- **Career:**
    - **KAM:** The key account manager can be added here.
    - **Date of Entry:** Here the entry date of the contact person can be entered.
    - **Supervisor and Assistant:** Superiors and the assistant of the contact person can be entered here.
    - **Office:** This field indicates the office of the contact person in the contact.
    - **Profession and Organization:** The occupation and organizations of the contact person can be entered here.
    - **Previous and Further Companies:** If necessary, further and former companies of the contact person are entered here.

- **Networking:** The contact person's **Xing**, **Facebook**, **LinkedIn** and **Google+** profiles can be linked here.

- **Related Contact Persons:** Any contact persons can be assigned to the defined contact person here. The contact persons are managed in the mask [contact person](#).

Private

- **Address & Communication:**
    - **Street, Postcode, City and Country:** These fields indicate the complete (private) address of the contact person.
    - **Private Communication Options (Telephone, Mobile, Fax, e-mail Address):** These fields indicate the contact person's availability by telephone (office and mobile), fax and e-mail. Clicking on the e-mail address opens the user's standard mail program with the entered e-mail address.

- **Other Private Information:**
- **Birthday and Hobbies:** Here you can store further private information about the contact person.
- **Name of the Partner and Name of the Child(ren):** If desired, the name of the partner and the names of the children of the contact person can be entered here.

Miscellaneous

- **Supplier Evaluation:** This element enables the suppliers to evaluate, for example: prices or punctuality.

- **Technical Settings & Details:**
- **Receives ICal:** Here you can select whether the contact person receives ICal.

- **Old Record:** If this contact person was created with the "Create Duplicate" action, a reference to the original document is displayed at this point.

Actions

The document class contains the following actions:

- **Print:** This allows you to print the document.
- **Output Report Data:** This action prints the contact data in an Excel overview.
- **Set/Reset Locked Indicator:** This action enables you to lock or unlock the contact person for further use in the system.
- **Change Contact:** This action enables you to change a contact.
- **Create Project:** This action enables you to create a project.
- **Create VCard:** This action allows you to create a VCard.