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2.01.20 Contact

The **Contact Person** form administers any amount of contact persons to the assigned contact. Information about the department and function of the contact persons and the way of communication are defined here. A differing company address can also be defined here.

Tip: For more on this subject see chapter [3.11.04 The Contact System](#).

Contact Sander Peter

Document Edit View Back references Actions

Master data History Office Details Privat Misc

BaseInformation

Customer: CONSULT GmbH Type: Fixed

Salutation: Mister Titel: Doctor Ing

Contact name: Sander Contact first name: Peter

Department: Function: business manager

CustomerInformation2

Phone number: 089 / 73 13 105 Fax number: 089 / 73 13 10-10

Cell phone number: 0172 / 67 90 760

Email: p.sander@consult.de

Notes2

Note:

The form consists of the following elements:

On the “Master Data” tab:

- **Number:** This element designates distinctly the contact in System.
- **Customer:** This field refers to the company of the contact person.
- **Type:** In field Type, the in Collections (see Administration Guide) defined employee relation of the contact person (external employee, permanent employee, freelance, employer, etc.) can be assigned here.
- **Salutation, Title, First Name und Last Name:** These fields designate the salutation or/and the title as well as the first and last name of the contact person.
- **Telephone, Mobile, Fax und E-mail Addresses:** This field designates the accessibility of the contact person via telephone (office or mobile), fax and via email. Clicking the email address opens the user's standard email program with their entered email address.
- **Note:** Further comments concerning the contact person can be entered here.



On the “History” tab:

- **Action:** This element contains all applied actions of the contact person. The actions are

administered in the Action form.

- **Time Entries:** This element contains all of the appointments applied to the contact person. The actions are administered in Calendar.
- **Campaign:** Here all campaigns are transferred, in which the defined contact person has been chosen as the target group. The campaigns are administered in the campaign form.
- **Meeting:** This element contains all information about the meeting.



On the “Office” tab:

- **Department, Office und Function:** This field specifies the department, the office and the function for contact persons in Contact.
- **Supervisor and Assistant:** The supervisors and their assistants can be stored here.
- **Related Contacts:** Unlimited amount of contact persons can be assigned to the defined contact person. The contact persons are administered here.
- **Employment Date:** The employment entry date of the contact person can be entered here.



On the “Details” tab:

- **Profession and Organisation:** The profession and organisation of the contact person can be stored here.
- **Language, Foreign Language Skills(Occupation):** The language, foreign language skills and occupations/tasks can be stored here. The language can be defined in “Language” in Collections (Administration Guide).
- **Address, Postal Code, City und Country:** This field specifies the complete (business) address of the contact person.

  **Contact Williams George**

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Master data History Office Details **Privat** Misc

Phone private

HandyPrivate

FaxNumberPrivate

EmailPrivate 
 <mailto:george.williams@abc.com>

AddressPrivat

AddressLinePrivat Postal code City

CountryPrivat ▾

Birthday  ▾

Hobby

On the “Private” tab:

- **Private Communication : Telephone, Mobile, Fax, E-mail Address and Web:** These fields specify the accessibility of the contact person via telephone (office and mobile/cell), fax and email. Clicking the email address opens the user's standard email program with the entered email address.
- **Address, Postal Code, City and Country:** These fields specify the complete (private) address of the contact person.
- **Birthday, Wedding Day and Hobby:** Further private information of the contact person can be stored here.

The screenshot shows a web interface for managing contact information. The title bar reads 'Contact Williams George'. Below the title bar is a menu bar with options: Document, Edit, View, Back references, and Actions. A tabbed interface is present with tabs for Master data, History, Office, Details, Privat, and Misc (which is currently selected). The form contains the following fields:

- Blocked:** A checkbox.
- Reason for blocking:** A text input field.
- Employee:** Two dropdown menus followed by icons for copy, search, and delete.
- PreviousCompany:** A text input field.
- AdditionalCurrentCompany:** A text input field.
- NamePartner:** A text input field.
- NameChildren:** A text input field.

On the "Misc" tab:

- **Blocked, Reason:** This check-box allows for blocking the contact person for further use in System (project, contract). The reason for this blocking can be entered in the field Reason (e.g.: not employed in this company any longer).
- **Employee:** This element is for assigning an employee to the defined contact. This employee is responsible for the contact person.
- **Previous and Additional Firms:** If applicable, previous and additional firms of the contact person are entered here.
- **Name Partner and Name of Children:** If applicable, the contact persons name of spouse and the name of children of the contact person are entered here.

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