QRG 03 - Contacts

Quick Reference Guide: QRG 03 - Contacts

Valid for: ☑ In-Vivo | ☑ In-Vitro | ☑ Options and Upgrades |☐ Services

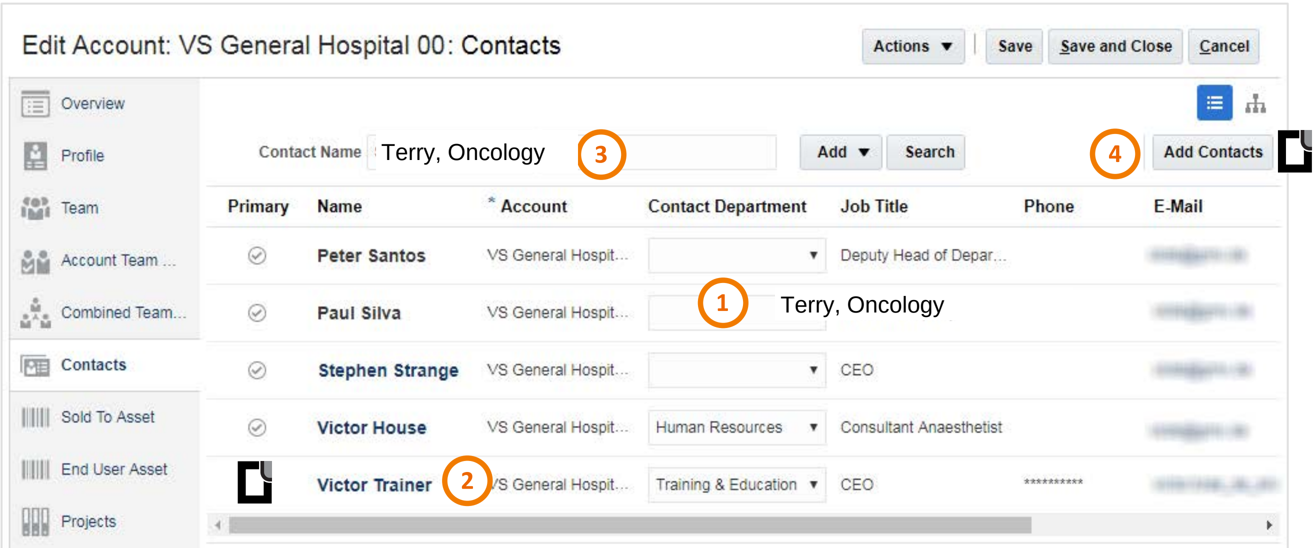
This document describes how to create and manage contacts in SHARE Cloud. Contacts are related to other objects like accounts, opportunities, leads, or teams. These items can directly be opened from the contact's menu.

The QRG is split in two sections: Section 1: Create a new contact as recommended from an existing account. This process saves time and automatically copies useful information from the account.

Section 2: Complete overview of all properties of a contact.

Section 1: Create a New Contact from an Existing Account: Recommended Procedure

To avoid having duplicates in the database it is important to check if a contact already exists before creating a new one. A duplication check supports you when creating a new contact. You can create new contacts or a new relationship to already existing contacts that belong to another account.



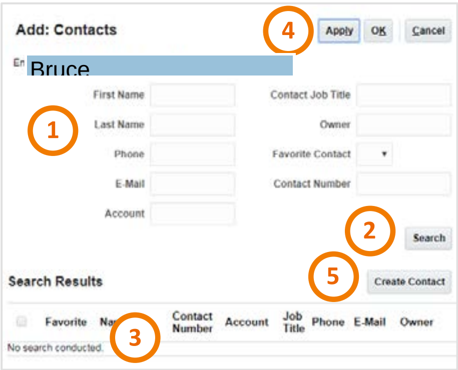
Open the subtab **Contacts** in the **Edit Account** window of the required account

(1) A list of contacts associated with the account displays **Name**, **Account**, **Contact Department**, **Job Title**, **Phone** and **Email**

(2) The **primary contact** is indicated on the left by a ✔

(3) Use the search function to narrow down the result list

(4) Click **Add Contacts**



- The **Add: Contacts** window opens
- It allows to either search for an existing contact or to create a new one
- Use this functionality to add contacts that belong to other accounts and to create a relationship

(1) Enter the search criteria

(2) Click **Search**

(3) Select the existing contact in the **Search Results** list

(4) Click **Apply** to confirm the selection (and **OK** to close the window)

(5) Click **Create Contact** to create a new contact

- The **Create Contact** window opens

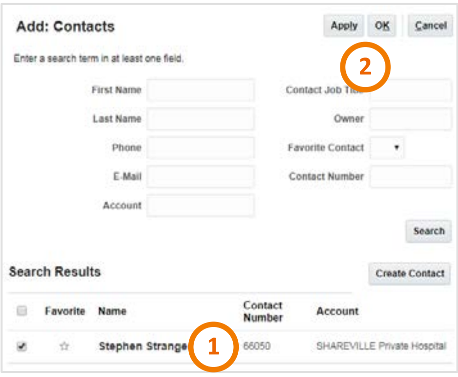
(1) In the upper section enter contact information e.g. name, title, role, phone number and email address

(2) In the lower section enter the address information of your contact or, alternatively, the account's address can be taken over

Mandatory fields are marked with an asterisk

(3) Click **Save and Close** to create this new contact record

The duplication check runs in the background and notifies you, if a possible duplicate is found



You're back on **Add: Contact** page

(1) The new contact is shown in the **Search Results** list

(2) Click **Apply** to confirm and **OK** to close the window

The new contact is now associated to the account and shown in the contact list.