

Contacts Management

Contacts Management consist of

- The creation and Editing of the Main Contacts
- Linking of Contacts associated with the Main Contact
- Listing of Recurring Tasks linked to a Contact
- Notepad Function to record Data of a Static Nature
- File Sharing
- History of important Communication with a Contact

Contacts Creation

The image shows a 'New Contact' form with the following fields and annotations:

- 1** * Name: Text input field containing 'Royal Mount Properties Ltd'.
- 2** * Short Name: Text input field containing 'Royal Mount'.
- 3** Code: Text input field containing 'Roy 001'.
- 4** * Category: Dropdown menu with 'Customer' selected.
- 5** Location fields: Three dropdown menus for 'Country' (South Africa), 'Province / State' (Western Cape), and 'City / Town' (Somerset West).
- 6** Default Phone: Text input field with a phone icon containing '021 333 3333'.
- 7** Default Email: Text input field with an email icon containing 'admin@royalprop.co.za'.
- 8** Controller: Dropdown menu with a person icon containing 'Claudia'.
- 9** Show More: A blue button at the bottom left.
- Cancel: An orange button at the bottom right.
- Create: A green button at the bottom right.

- 1. Name * Mandatory Field**
Enter the Registered Name of the Contact
- 2. Short Name * Mandatory Field**
Enter a Short Name for the Contact
- 3. Code**
This Field can be used for a Contact Code or Account Number
- 4. Contact Category * Mandatory Field**
Select a Contact Category
The Defaults are Customer / Supplier / Private
The Categories will be determined by the System Administrator
Private Contacts will not be visible by other Assignees
- 5. Regional Classification**
The Contact can be Regionally linked by Country, Province, and City
- 6. Default Phone Number**
Enter the Default Phone Number of the Contact
- 7. Default Email Address**
Enter the Default Email Address of the Contact

The Phone Numbers and Email Addresses of contacts associated with the Main Contact are captured as “Linked Contacts”
- 8. Controller * Mandatory Field**
The Controller would be the Assignee primarily responsible for communication with the Contact.
- 9. [Show More](#)**
The System allows for many additional Customisable Data Fields e.g.
Addresses
Website Detail
Reference Numbers etc.

Linked Contacts Display

Linked Contacts +			
Show All ▼ entries			
Copy CSV Excel PDF Print		Search: <input type="text"/>	
Name ⬇	Default Email ⬇	Default Number ⬇	
# Richard King	richard@royalprop.co.za	050 444 4444	
Ann Hannon	ann@royalprop.co.za	021 333 3337	
Gavin Hannon	gavin@royalprop.co.za	058 888 8888	

Tip

Prefix the Name of the most frequently Linked Contact you communicate with, with a # for it to appear on Top
 – this would save time especially if you have multiple Linked Contacts.

Linked Contacts also allows for additional Customizable Data Fields

Recurring Tasks

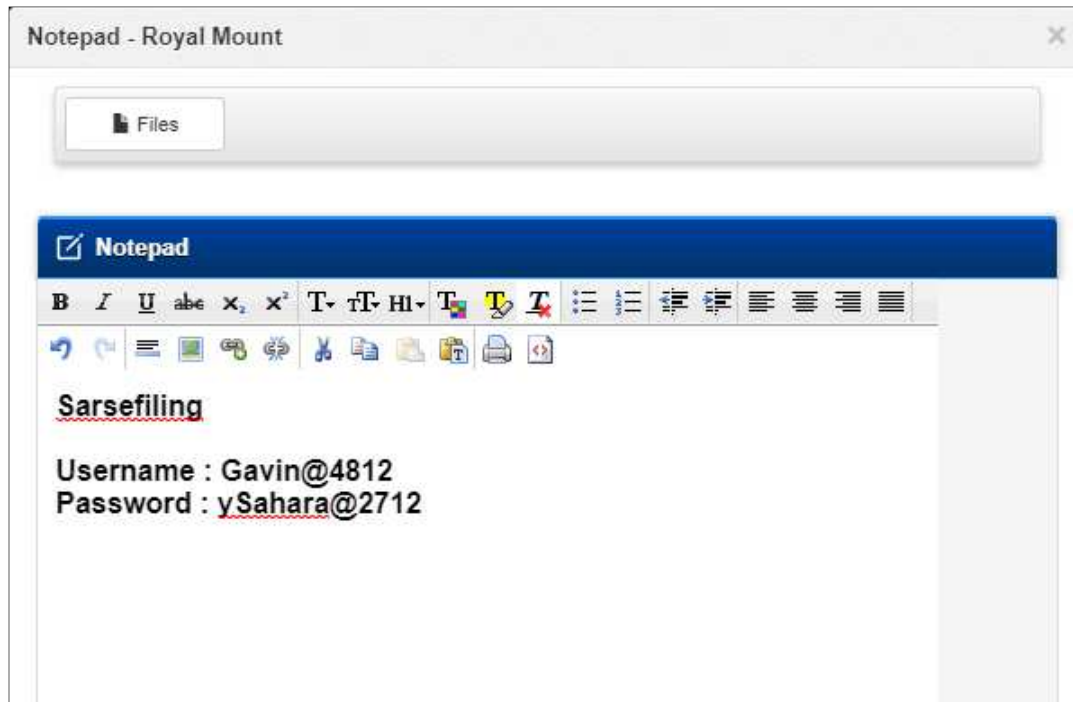
The Recurring Tasks linked against this Contact

Recurring - Royal Mount ×					
Recurring Notepad Files History					
Show All ▼ entries					
Copy CSV Excel PDF Print			Search: <input type="text"/>		
Assignene ⬇	Activity ⬇	Task Description ⬇	Frequency ⬇	Cycle ⬇	
Claudia	Admin	Update Cash Flow	Weekly on a Tuesday	1	
Claudia	Payroll	Process Wages	Weekly on a Thursday	1	
Claudia	VAT201	VAT201 - 4141 414 414	Monthly on 20th	1	

Showing 1 to 3 of 3 entries

Notepad

The Notepad allows for the recording of any Data of a Static\c or General nature



Files

Cascades allows for the Upload of Folders and Files into the Cloud.
Files are classified as Public (shareable) or Private

The SA (System Administrator) would create the Folders

- New Files are then uploaded
- The Files are downloaded for Editing or Viewing
- and then uploaded back into the Cloud

History

History is a function to keep a record of important meetings, conversations, and other agreements between a Contact and yourself, or against a Project

It also allows allocating Follow-up action.