

EW Assist

08/02/13

Contacts – A user guide

Directory > Companies

EW Assist includes a useful contact management system which has the added advantage of making the companies and their respective contacts available throughout the rest of EW Assist.

Finding a Company

Directory > Companies > List

Use the Search area at the top of the page to filter the list of Companies

Directory > Companies > Internal Staff

Find a list of Companies by their relationship to a member of staff or a Group

Directory > Companies > Company Contact

Find the Company by the contact details of the person who belongs to the Company

Adding a Company

Directory > Companies > Add > Company

IMPORTANT: for the user to be able to add new contacts and administer the Contact module they will need to have a Functionality Role of 'Company Info Admin'.

Complete at least the starred (*) fields to add a new company and click Add. Once the main company information is added you can then add the following on the next page:

- Members of your staff who have the relationship with this company
- Specific external contacts within the new company
- Additional locations associated with this company

Editing a Company

Find the Company in the list and click on the Company name to open it. Next to the Company Reference is the Edit link. The edit page allows you to edit the main Company information, any additional locations and any user defined company information (see below).

Editing a Company Contact

Find the Company to which the Contact belongs. Click the link on the number of external contacts to open the list of contacts for that company and click Edit next to the contact you wish to edit. Editing a contact allows you to change the main information about the contact and update any user defined contact information (see below).

Important: Functional Role of Company Information Admin is required for the following

User defined company information

To capture other relevant information about a company you can add your own customised fields. These might include Christmas list, green rating, credit score, last used date and operational coverage. Before you can add a custom field to a company you have to create that field. To do this go to **Directory > Companies > Add > Company Additional Info Type**. Give the new field a name in Information Type and choose the best description of the type of information to be recorded. For instance:

- Is Date – a date format
- Is Text - a few words
- Is Bit - a yes/no answer
- Is Number - a big number
- Is Memo – a paragraph or two
- Is Int – a small number
- Is Geo Co Ords – a point on a map e.g. 51.500996, -0.142246

User defined contact information

To capture other relevant information about a contact you can add your own customised fields. These might include favourite restaurant, preferred contact method and last called. Before you can add a custom field to a contact you have to create that field. To do this go to **Directory > Companies > Add > External Contact Additional Info Type**. Give the new field a name in Information Type and choose the best description of the type of information to be recorded (as above).

Other configurable settings

Available in **Admin > Settings > Lookup tables > Business Information > ...**

Scope

The broad relationship between your company and the contact company e.g. Customer

Type

A finer control of the relationship between your company and the contact company e.g. Customer Level 1

Business Type

The business category in which the contact company belongs e.g. legal, accountancy, services etc

Internal Contact Type

The type of relationship your staff members have with the contact e.g. representative, project manager, carer etc

External Contact Type

The type of relationship the contact in the company has with your staff e.g. account manager, customer representative, main contact etc