

## CHAPTER 3: CONTACTS

This chapter contains the following sections:

- Setting Up Contacts
- The Contact Card
- Creating Contact Companies
- Creating Contact Persons
- Searching for Contacts
- Searching for Duplicates
- Synchronizing Contacts with Customers, Vendors, and Bank Accounts
- Exporting Contacts
- Contact Statistics
- Contact Reports
- Exercise
- Self-Test

## Setting up Contacts

In the Sales & Marketing application area, you can record as contacts all the external entities that you have business relations with, for example, customers, prospective customers, vendors, lawyers, consultants, and so on.

When creating contacts in the program, you can enter specific information, such as the industry the contact companies belong to and your business relations with the contacts. Before you can do this, you must set up the different codes you will use to assign this information to your contact companies and people: mailing groups, industry groups, business relations, Web sources, organizational levels, and job responsibilities.

### Setting up Mailing Groups

Mailing groups are used to identify groups of contacts that you want to send the same information to, such as a price list or a Christmas card. You set up mailing groups in the Mailing Groups window.

To set up mailing groups, follow this procedure:

- 1 Click SALES & MARKETING→MARKETING→SETUP→MAILING GROUPS. The Mailing Groups window appears.



- 2 Press F3 to enter a new mailing group.
- 3 In the **Code** field, enter a code for the new mailing group.
- 4 In the **Description** field, enter a description of the new mailing group.

The **No. of Contacts** field contains the number of contacts that have been assigned the mailing group. To see a list of the contacts you have assigned the mailing group, click the **AssistButton** to the right of the **No. of Contacts** field, or click MAILING GROUP→CONTACTS. The Mailing Group Contacts window appears.



In this window, you can assign new contacts to the mailing group.

## Setting up Industry Groups

You can use industry groups to specify which industry your contact companies belong to, for example, the retail industry. You set up industry groups in the Industry Groups window.

To open the Industry Groups window, click SALES & MARKETING→SETUP→COMPANY→INDUSTRY GROUPS.



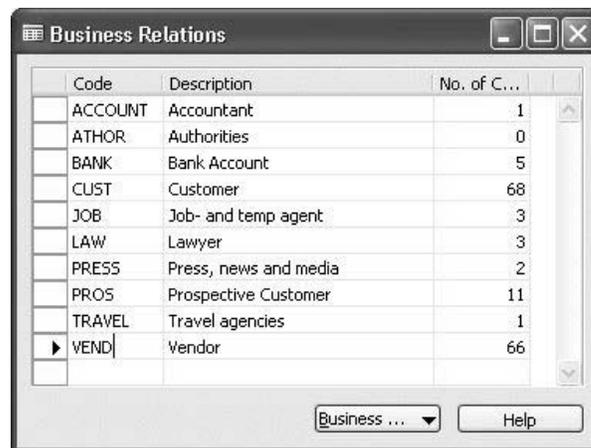
To set up industry groups, follow the same procedure as for setting up mailing groups.

The **No. of Contacts** field contains the number of contact companies that have been assigned the industry group. To see a list of the contact companies that you have assigned the industry group, click the **AssistButton** to the right of the **No. of Contacts** field, or click INDUSTRY GROUP→CONTACTS. The Industry Group Contacts window appears. In this window, you can assign contact companies to the industry group.

### Setting up Business Relations

Business relations are used to indicate the business relationship you have with your contact companies. You can specify whether a contact is a customer, a bank, a vendor, and so on. You set up business relations in the Business Relations window.

To open the Business Relations window, click SALES & MARKETING→SETUP→COMPANY→BUSINESS RELATIONS.



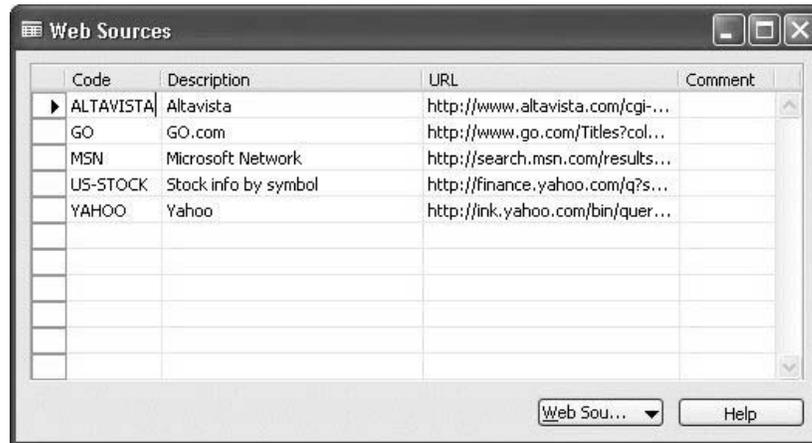
To set up business relations, follow the same procedure as for setting up mailing groups.

The **No. of Contacts** field contains the number of contact companies that have been assigned the business relation. To see a list of the contact companies that you have assigned the business relation, click the **AssistButton** to the right of the **No. of Contacts** field, or click BUSINESS RELATION→CONTACTS. The Business Relation Contacts window appears. In this window, you can assign business relations to other contact companies.

### Setting up Web Sources

In the Web Sources window, you can set up the Web sources (search engines and Web sites) you want the program to use when looking for information about your contact companies on the Internet.

To open the Web Sources window, click SALES & MARKETING→SETUP→COMPANY→WEB SOURCES.



In the **URL** field, enter the URL the program will use to search for information about the contact company on the Internet. Type %1 to indicate the place of the search word in the URL. When you launch the Web source from a contact card, the program will replace %1 with the search word (for example, the name of the company) that you have entered in the Contact Web Sources window.

### Setting up Organizational Levels

In the Organizational Levels window, you can set up the organizational levels you want to use when entering information about your contact people, for example, Manager.

To open the Organizational Levels window, click SALES & MARKETING→SETUP→COMPANY→ORGANIZATION LEVELS.



## Setting up Job Responsibilities

In the Job Responsibilities window, you can set up the job responsibilities you want to use when entering information about your contact persons, for example, Sales Responsible.

To open the Job Responsibilities window, click SALES & MARKETING→SETUP→COMPANY→JOB RESPONSIBILITIES.

The **No. of Contacts** field contains the number of contact people that have been assigned the job responsibility. To see a list of the contact people that you have assigned the job responsibility, click the **Assist** button to the right of the **No. of Contacts** field, or click JOB RESPONSIBILITY→CONTACTS. The Job Responsibility Contacts window appears:



In this window, you can assign new contact persons to the job responsibility.

## The Contact Card

The contact card contains information about your contacts. To open the contact card, click SALES & MARKETING→MARKETING→CONTACTS.

You can use the contact card to view information about your contacts, and you can also create a new card for each company or person that you want to record in the program.

The contact card contains both basic information (for example, the name, address, and phone number of the contact) and more detailed information that helps you improve and personalize your business relationship with your contacts, such as information about a company's size and ownership and information about people's interests and family life.

Here is the contact card for The Cannon Group:

The screenshot shows a contact card window titled 'CT000001 The Cannon Group PLC - Contact Card'. It has several tabs: General, Communication, Segmentation, Foreign Trade, and Commerce Portal. The 'General' tab is active, showing fields for No. (CT000001), Type (Company), Company No. (CT000001), Company Name (The Cannon Group PLC), Name (The Cannon Group PLC), Address (192 Market Square), Post Code/City (GB-B27 4KT Birmingham), and Country Code (GB). On the right side, there are fields for Search Name (THE CANNON GR...), Phone No., Salesperson Code (PS), Salutation Code (COMPANY), Last Date Modified (31-01-03), Date of Last Interaction (31-01-03), Last Date Attempted (31-01-03), and Next To-do Date. Below these fields is a table with columns for Question, Answer, Que..., and Last Dat... containing data for Discount, Profit, Company Ownership, and No. of employees. At the bottom, there are buttons for Contact, Functions, Create Interact, and Help.

Question	Answer	Que...	Last Dat...
Discount (%) Last Year	Low discount usage		31-01-01
Discount (%) Current Year	Medium discount usage		31-01-01
Profit (LCY) Current Year	Top 25 % of Customers		31-01-01
Company Ownership	Stockexchange		31-01-01
No. of employees	1..99		31-01-01

By combining general and detailed information about the contact, the contact card gives you an instant view of who the contact is. The contact card is composed of two parts:

- The header, which contains general, communication, segmentation, and foreign trade information about the contact.
- The lines, which contain an overview of the contact's profile. You can enter the contact's profile in the Contact Profile Answers window (see "Profiling and Classification").

## The General Tab

On the **General** tab, you can view general information about your contact.

### *The Type of Contact*

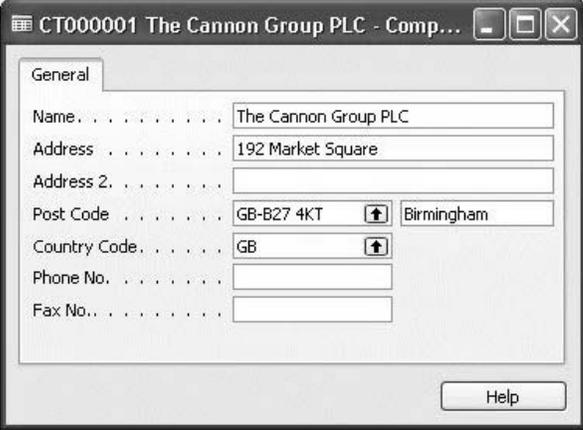
The contact card can contain both contact people and contact companies. In the **Type** field, you can see whether the contact is a company or a person:

- If the contact is a person, the **Company No.** field contains the number of the contact company the person works for, and the **Company Name** field contains the name of the contact company the person works for.
- If the contact is a company, the **Company No.** and **Company Name** fields are not active.

## **Company Details**

If the contact is a person, you can view details about the company that the contact person works for in the Company Details window.

To open the Company Details window, click the **AssistButton** to the right of the **Company Name** field.



The screenshot shows a window titled "CT000001 The Cannon Group PLC - Comp...". The window has a "General" tab. The fields are as follows:

Name	The Cannon Group PLC	
Address	192 Market Square	
Address 2		
Post Code	GB-B27 4KT	Birmingham
Country Code	GB	
Phone No.		
Fax No.		

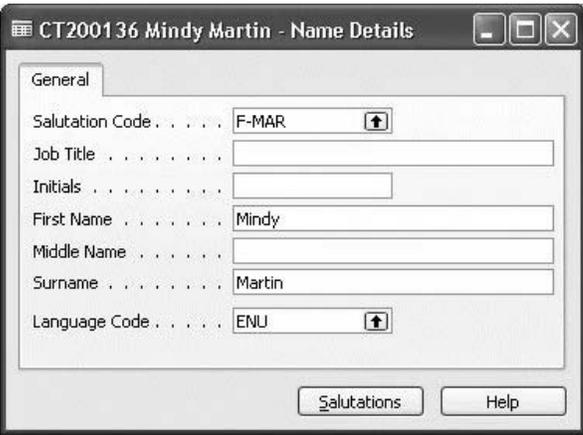
There is a "Help" button at the bottom right of the window.

In this window, you can see a short presentation of the company. It contains the basic information that identifies the contact company the person works for, such as name and address details. This window enables you to see which company a contact person works for without having to open the contact card.

## **Name Details**

If the contact is a person, you can see the details of the contact's name in the Name Details window.

To open the Name Details window, click the **AssistButton** to the right of the **Name** field.



The screenshot shows a window titled "CT200136 Mindy Martin - Name Details". The window has a "General" tab. The fields are as follows:

Salutation Code	F-MAR
Job Title	
Initials	
First Name	Mindy
Middle Name	
Surname	Martin
Language Code	ENU

There are "Salutations" and "Help" buttons at the bottom of the window.

In this window, you can enter the different parts of a contact's name, as well as the contact's job title and assigned salutation.

### ***The Interactions Involving the Contact***

The **Date of Last Interaction** field on the contact card contains the date of the last successful interaction involving the contact, for example, a received or sent mail or e-mail.

The **Last Date Attempted** field contains the date when the contact was last contacted, for example, when you tried to call the contact with or without success.

The information contained in the **Date of Last Interaction** and **Last Date Attempted** fields depends on the type of contact:

- If the contact is a company, the **Date of Last Interaction** and **Last Date Attempted** fields contain information based on the interactions involving the company, as well as those involving the people working for that company.
- If the contact is a person, the **Date of Last Interaction** and **Last Date Attempted** fields contain information based on the interactions involving the particular person.

To see more details about the interaction, click the **AssistButton** to the right of the field.

### ***The To-dos Involving the Contact***

The **Next To-do Date** field contains the date of the next to-do involving the contact.

To see more information about the to-do, click the **AssistButton** to the right of the field.

## The Segmentation Tab

The Segmentation tab contains information about the mailing groups, industry groups, business relations, job responsibilities, and organizational levels assigned to the contact. Click the **Segmentation** tab.

Question	Answer	Que...	Last Dat...
Discount (%) Last Year	Low discount usage		31-01-01
Discount (%) Current Year	Medium discount usage		31-01-01
Profit (LCY) Current Year	Top 25 % of Customers		31-01-01
Company Ownership	Stockexchange		31-01-01
No. of employees	1..99		31-01-01

The **No. of Mailing Groups** field contains the number of mailing groups assigned to the contact.

The **No. of Business Relations** field contains the number of business relations assigned to the contact.

The **No. of Industry Groups** field contains the number of industry groups assigned to the contact.

If the contact is a person, the **No. of Mailing Groups**, **No. of Business Relations**, and **No. of Industry Groups** fields contain information about the mailing groups, business relations, and industry groups assigned to the contact company the person works for. Click the **AssistButton** to the right of these fields to see which mailing groups, business relations, and industry groups are assigned to the contact.

For example, if you click the **AssistButton** to the right of the **No. of Business Relations** field, the Contact Business Relations window appears, containing a list of the business relations you have assigned to the contact company.



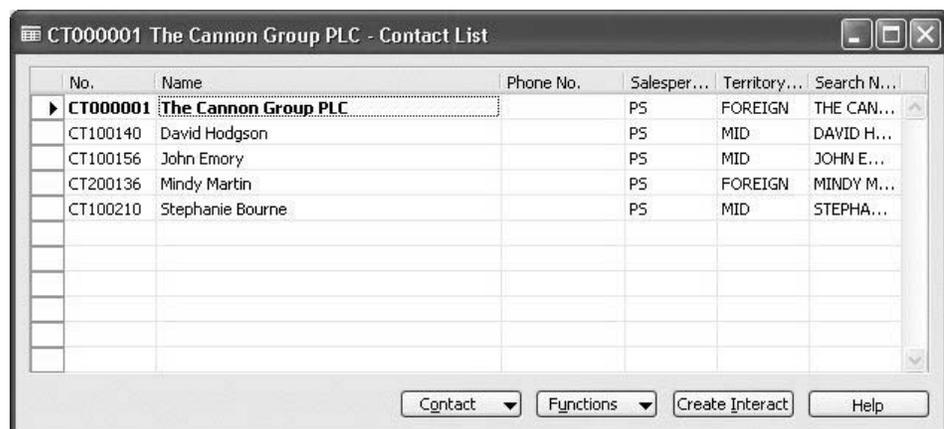
The **No. of Job Responsibility** and **Organizational Level Code** fields are only valid for contact people.

If the **Exclude from Segment** field is selected, it indicates that the program should not include the contact in segments.

### Viewing Related Contacts

You can view a list of the contacts working within a company in the Contact List window. This window contains both the contact company and the people working within the company.

To view a list of the contact people working for The Cannon Group on the contact card for The Cannon Group, click CONTACT→RELATED CONTACTS.



This window gives you a quick overview of your contact people within a company. It also enables you to quickly and easily navigate from a contact person card to the contact card of the company the person works for or to the contact card of other people working for the same contact company.

### Creating Contact Companies

You create a contact company by setting up a contact card for the company.

To create a contact company in the Sales & Marketing application area, follow this procedure:

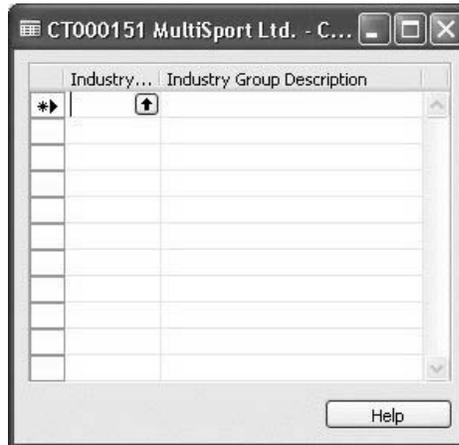
1. Click SALES & MARKETING→MARKETING→CONTACTS. The contact card appears.
2. Press F3 to enter a new contact.
3. In the **No.** field, press ENTER to have the program automatically enter the next available contact number.
4. In the **Type** field, select Company.
5. In the **Name** field, enter the name of the contact company.
6. In the **Address**, **Post Code/City**, and **Phone No.** fields, fill in the relevant information.
7. In the **Salesperson Code** field, select the name of the responsible salesperson.

After you have created a contact card for your new contact company, you can enter more detailed information, such as the industry the company belongs to, your business relationship with the company, and so on.

## Assigning Industry Groups to Contact Companies

To assign an industry group to a contact, follow this procedure:

1. On the contact card, click **Contact**, **Company**, and then **Industry Groups**. The **Contact Industry Groups** window appears:



2. Press **F3** to assign a new industry group to the company.
3. Click the **AssistButton** to the right of the **Industry Group Code** field to see the available industry groups.
4. Select the relevant industry group and click **OK**.

The program automatically enters 1 in the **No. of Industry Groups** field on the **Segmentation** tab of the contact card.

## Assigning Business Relations

To assign business relations to a contact, follow this procedure:

1. On the contact card, click **CONTACT**→**COMPANY**→**BUSINESS RELATIONS**. The **Contact Business Relations** window appears.
2. Press **F3** to assign a new business relation to the company.
3. Click the **AssistButton** to the right of the **Business Relation Code** field to see the available business relations.
4. Select the relevant business relation code and click **OK**.

The program automatically enters 1 in the **No. of Business Relations** field on the **Segmentation** tab of the contact card.

## Assigning Web Sources

You use Web sources to have quick access to all types of information about your contact on the Internet.

In the Contact Web Sources window, you can select a search engine or Web site and enter a search word that the program will use when searching for information about the contact on the Internet.

To assign a Web source to a contact, follow this procedure:

1. On the contact card, click **CONTACT**→**COMPANY**→**WEB SOURCES**. The Contact Web Sources window appears.
2. In the **Web Source Code** field, select the desired search engine or Web site.
3. In the **Search Word** field, enter the word you want the program to use to search for information about the company.

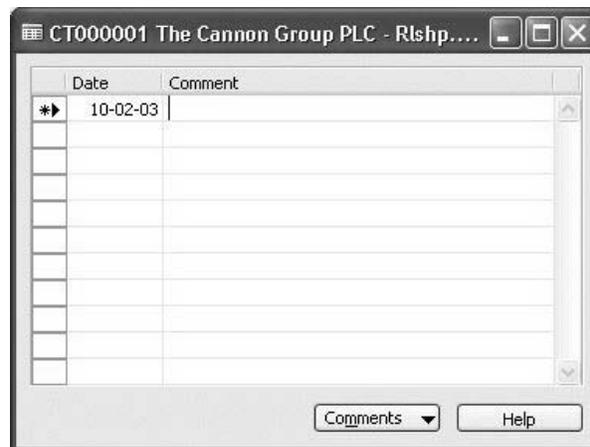
## Launching Web Sources

To have the program open your Internet browser and display a list of matching links, click **Function** and then **Launch**.

## Entering Comments

You can enter comments about a contact in the Rlshp. Mgt. Comment Sheet window. Follow this procedure:

1. On the contact card, click **Contact** and then **Comments**.



2. The work date automatically appears in the **Date** field. You can enter another date if you like.
3. In the **Comment** field, enter any comments you have about the contact.

## Test Your Skills – Setting Up a Contact Company

**Scenario:** As a salesperson working for Cronus, you regularly meet prospective customers. At the end of each week, you enter the results of your visits in the Sales & Marketing application area.

Earlier today, you had a meeting with a new prospective customer, a company called MultiSport, which seemed to be interested in Cronus' new bicycle model.

1. Create MultiSport as a contact company in the Sales & Marketing application area. The company details are:

MultiSport Ltd.  
2200 Newport Street  
GB-N12 5XY London  
Telephone 5050-4545

Richard Lum (RL) is the responsible salesperson.

2. As a reseller of sport equipment, MultiSport Ltd. belongs to the retail industry. Assign the Retail industry group to MultiSport.
3. MultiSport is not yet a customer of Cronus, but a prospective customer. Enter the business relationship you have with MultiSport in the Contact Business Relations window.
4. Because you closely follow your contacts' business environment, you would like to have quick access through Yahoo to all types of information about MultiSport Ltd. on the Internet. Assign Yahoo as a Web source for MultiSport. Use "Multisport" as the search word.
5. You would like to specify that any question concerning MultiSport be addressed to you. Enter this information in the Rlshp. Mgt. Comment Sheet window.

## Creating Contact Persons

You create a contact person by setting up a contact card for the person. You can create contact persons for existing contact companies, or you can create independent contact persons.

### Creating Contact Persons for Existing Contact Companies

To create a contact person for an existing contact company, follow this procedure:

1. Click SALES & MARKETING→MARKETING→CONTACTS.
2. On the contact card, press F3 to enter a new card.
3. In the **No.** field, press ENTER to have the program automatically enter the next available contact number.
4. In the **Type** field, enter Person.
5. In the **Company No.** field, enter the contact number of the relevant contact company. Click the **AssistButton** to the right of the field to see a list of the existing contacts.

The program automatically copies the address details, salesperson code, and phone number from the company's contact card to the contact person's contact card.

### Entering Name Details

To enter the details of the contact person's name, follow this procedure:

1. Open the Name Details window by clicking the **AssistButton** to the right of the **Name** field.
2. In the **Salutation Code** field, click the **AssistButton** to the right to open the Salutations window.
3. In the Salutations window, click SALUTATION→FORMULAS to open the Salutation Formulas window, and then select or create a salutation formula as described in "Multilanguage Salutation and Attachment."

### Creating Independent Contact Persons

The Sales & Marketing application area also enables you to record independent contact persons. Independent contact persons are people who do not work for a particular company, but who work independently or free-lance. You can enter the details of an independent contact person on a contact card.

To create an independent contact person, follow this procedure:

1. Click SALES & MARKETING→MARKETING→CONTACTS.
2. On the contact card, press F3 to enter a new card.
3. In the **No.** field, press ENTER to have the program automatically enter the next available contact number.
4. In the **Type** field, enter Person.
5. Leave the **Company No.** field empty.
6. In the **Name** field, enter the contact person's name.
7. Enter the contact person's address details in the appropriate fields.

### **Finding an Independent Contact in the Contact List Window**

The program automatically inserts independent contact people at the top of the Contact List window.

To find the independent contact in the Contact List window, go to the contact card and click CONTACT→LIST. Then scroll to the top of the Contact List window. The program displays the independent contacts in alphabetical order.

## Test Your Skills – Creating Contact Persons

**Scenario:** A few weeks after your first meeting at MultiSport, you meet the purchaser, Mr. Smith. When you come back to the office, you would like to record Mr. Smith in the program as a contact person at MultiSport. Mr. Smith gave you his business card, which looks like this:

MultiSport Ltd. <i>Sportswear</i>
John Smith - Purchaser
2200 Newport Street, GB-N12 5XY London Phone 5050 4545          Direct 5050 4567

1. Create a contact card for Mr. Smith. Include the details listed on the business card.
2. Enter Mr. Smith's details in the Name Details window.
3. Enter John Smith's job responsibility in the program.

For the translation of all publications concerning their products and corporate information, Cronus works with a freelance translator, Madeline Parker. You would like to record her as a contact in the program.

1. Create a contact card for Madeline Parker as an independent contact person.
2. Enter Madeline Parker's address details:  
456 Swimthon Street  
GB-MO2 4RT Manchester
3. Find Madeline Parker's name in the Contact List window.

## Searching for Contacts

The Contact Search feature allows you to increase the accuracy of your search for contact information. The results of the search will be based on the nearest match or closest match for the word or group of words you have entered in the **Find What** field. You do not have to enter the exact word or phrase in order to find results with the Contact Search feature. Just enter one of the words you are looking for.

For example, when an employee receives a phone call, he needs to quickly find the contact card and other information to serve the customer individually. The employee may not always have his customer's complete name to search for or perhaps he cannot remember exactly how it is spelled. With Contact Search, the employee can find his customer's contact card using the approximate spelling of the customer's name or just the customer's company name or some other detail about the customer that he can remember quickly.

### Fields Supported by Contact Search

While searching for contacts, the program considers the following fields:

In the Contact table:

- Name
- Search Name
- Name 2
- Address
- Address 2
- City
- Phone No.
- Telex No.
- Fax No.
- Telex Answer Back
- VAT Registration No.
- Post Code
- County
- E-Mail
- Home Page
- Company Name
- Mobile Phone No.
- Pager

In the Rlshp. Mgt. Comment Line table:

- Comment

In the Interaction Log Entry table:

- Description
- Subject

In the To-do table:

- Description

In the Opportunity table:

- Description

### **Blurry Keys**

For all words the program has found in the fields listed above, it creates one or two blurry keys following a certain fuzzy logic algorithm, for example, JN and AN for Jean or KRX and KRK for Karch. After the program has completed the search for the exact match, it performs the search on the basis of the blurry keys which allows you to find words with a close spelling and/or pronunciation in the languages of the Romano-Germanic group, and therefore increases the search hit rate.

The program does not use the blurry keys while searching for contacts if you have selected the check box in the **Exact Match** field in the Contact Search window or if you use the wildcards in your search query.

To be able to use the Contact Search feature, you should set up some parameters that the program will use while searching for contacts.

### **Setting up Search Parameters**

#### ***Reindexing information***

You need to index the information that will be used for future searches, especially if you have modified or added any information.

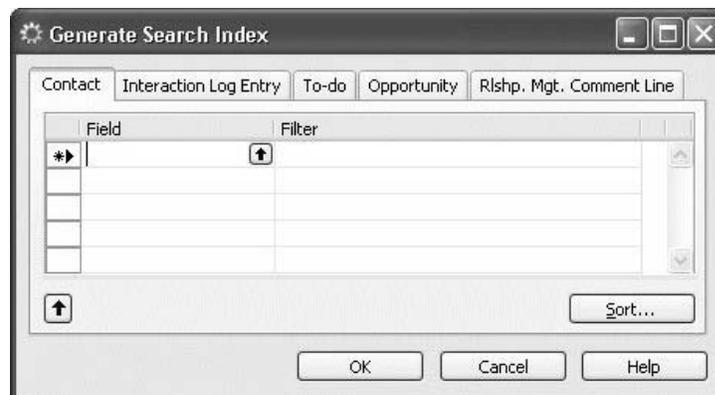
You may choose to have the contact search index generated automatically or do it manually:

1. Click SALES & MARKETING→SETUP→MARKETING SETUP. In the **Search Index Mode** field, select the option you need – Auto or Manual.

2. If you select Auto, each time you add or modify any information or if you change the description of an interaction or a contact address, the program will automatically update the data in the fields. This is processed by the contact search feature as well as the blurry keys for the words they contain for future search operations.
3. If you select Manual, you will need to run the Generate Search Index batch job for the program to process the new or changed information for future search operations.

To reindex the information about contacts:

1. Click SALES & MARKETING→SETUP→PERIODIC ACTIVITIES.
2. Click **Generate Contact Search Index**. Choose the area you want to reindex.
3. The corresponding Generate Search Index window appears. If, for example, you have chosen to reindex all areas simultaneously, the Generate Search Index window will look like the following illustration:



4. Enter the filters you want to apply (optional).
5. Click **OK** to start reindexing. The progress bar appears, indicating the status of the process. It shows the information about the overall and current processes.

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**NOTE:** Try to avoid clicking **Cancel** during the reindexing process. This may cause unpredictable results, and the search function will work incorrectly.

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## Setting Up Delimiters

You may also want to define a set of characters that the system will use to split the textual information into smaller parts, which will be used while performing the search.

# Microsoft Navision Relationship Management

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The following characters are used by the system as default delimiters:

! " # \$ % & ' ( ) \* + , - . / : ; < = > ? @ [ \ ] ^ \_ ` { | } ~

Using delimiters in the program allows you to increase the search hit rate. For example, say that in the Rlshp. Mgt. Comment Line window, you entered the comment:

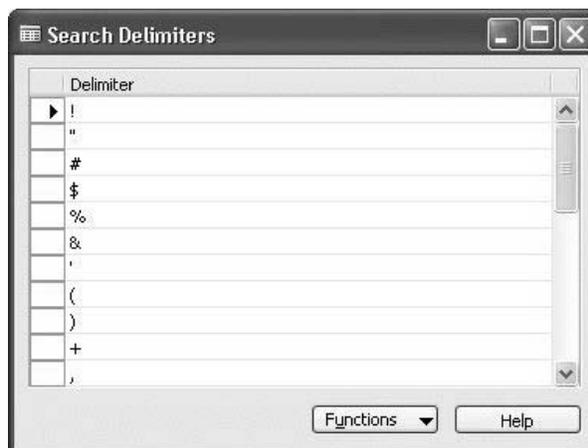
Call the manager,important!

You were in a hurry and did not read this sentence again. You therefore forgot to put a space between the two words: “manager” and “important.”

Later you are looking for the contact with this comment. Unless you have put a comma “,” into the delimiters set, you will not be able to find this entry. If a comma is not considered by the program as a separator between words, you will never find this comment line by entering either manager or important in the **Find What** field. The system will look for the manager,important entry only.

To set up search delimiters, follow this procedure:

1. Click ADMINISTRATION→APPLICATION SETUP→SALES & MARKETING→CONTACT SEARCH DELIMITERS.
2. The Search Delimiters window appears. It contains the delimiters that the program uses while searching.



3. Enter or delete any delimiters you want. If you do so, the dialog box appears asking you to reindex the information according to the new settings. Click **Yes** to start reindexing. The progress bar appears. Your new settings are saved into the database.

If you click **No**, your changes will not be accepted.

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**NOTE:** If you have changed the set of delimiters and then decided to return to the default one, click **Functions** and then **Restore Delimiters Defaults**.

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The four characters, space ( ), asterisk (\*), “at” (@), and question mark (?), are used by the program as delimiters regardless of whether or not they are included in the current delimiters list.

You can open the Contact Search feature from the Sales & Marketing area, as well as from the Contact Card or the Contact List and the Create Interaction, Create To-do, and Create Opportunity wizards.

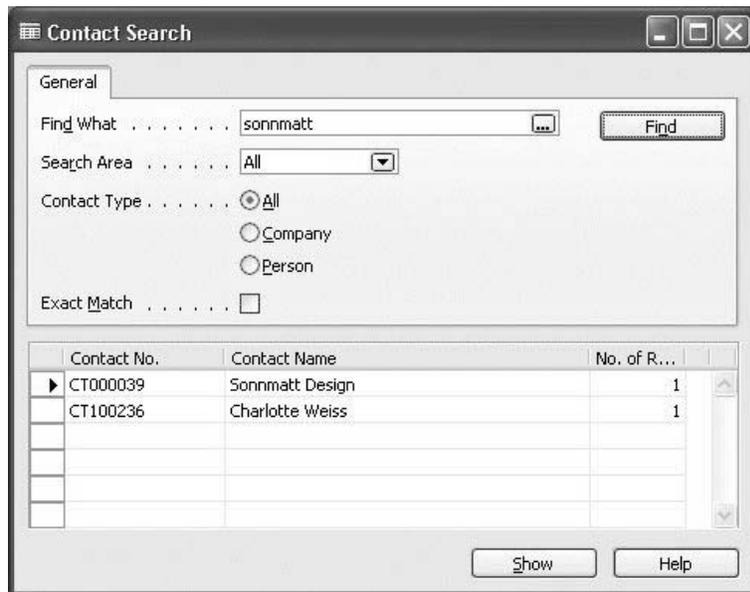
## Searching for Contacts from the Main Menu

To search for a contact from the main menu, follow this procedure:

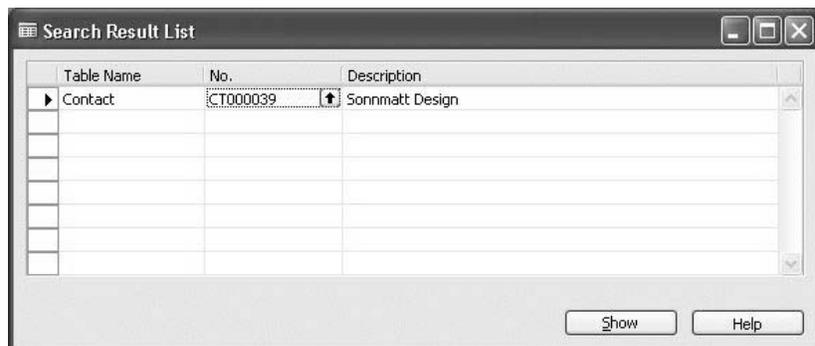
1. Click SALES & MARKETING→MARKETING→CONTACT SEARCH. The Contact Search window appears.

2. In the **Find What** field on the **General** tab, type a word or phrase that is related to the contact you want to find.
3. Select the area to search in from the Search Area drop-down menu. Select the type of contact you will search for by clicking one of the following options in the **Contact Type** field: All, Company, or Person.
4. If you want the program to find only exact matches, select the **Exact Match** check box.
5. Click **Find**.

- The search results (if any) will be displayed on the lines in the bottom part of the window.



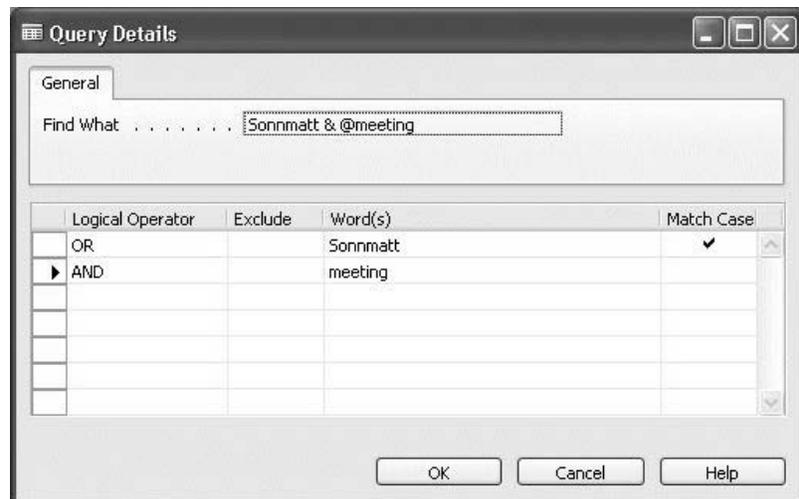
- Select the contact you need, and click **Show** to view the Contact Card.
- If you want to see the place where the match was found, on the Contact Search window, place the cursor in the **No. of Records** field of the contact you need, and click the drill-down button to the right. The Search Result List appears. You can view the corresponding card (or the list for the Interaction Log Entry) where the match was found by clicking **Show**.



## Using the System to Compose Search Expressions

If you are not sure how to enter a search expression, you can have the system help you compose it. Do the following:

1. Click SALES & MARKETING→MARKETING→CONTACT SEARCH. The Contact Search window appears.
2. In the **Find What** field on the **General** tab, you can type a word or phrase that is related to the contact you want to find, or you may leave the field blank.
3. Click the **AssistEdit** button at the end of the **Find What** field. The Query Details window appears.



4. In the **Logical Operator** field, select the option you need from the drop-down menu.
5. Select the **Exclude** check box if you want the system to search for the contacts that do not contain the search word(s) in the **Word(s)** field.
6. In the **Word(s)** field, add a new word or edit the existing one (if any) for the contact you want to find.
7. Select the **Match Case** check box if you want the system to take letter case into consideration. You may enter several lines of the extended search expression (repeat steps 4-7).
8. Click **OK**. The Contact Search window will appear. The system breaks down the search expression and places it in the **Find What** field using special symbols. You may specify other search parameters (see step 3 and further of the previous procedure), or just click **Find** to initiate the search. To view the results, follow the procedure (from step 7) described above.

---

***NOTE:** If you have entered an incorrect search expression, a warning message will appear. Press F1 to see the rules for entering search expressions.*

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## Searching for Contacts from the Contact Card or the Contact List

You can also use the Contact Search feature from the Contact Card or the Contact List.

To search for contacts from the Contact Card or the Contact List:

1. Click **FUNCTIONS**→**CONTACT SEARCH**. The Contact Search window appears.
2. In the **Find What** field on the **General** tab, type a word or phrase that is related to the contact you want to find.
3. Select the area you want to search from the Search Area drop-down menu. Select the type of contact you will search for by clicking one of the following options in the **Contact Type** field: All, Company, or Person.
4. If you want the program to find only exact matches, select the **Exact Match** check box.
5. Click **Find**.
6. The search results (if any) will be displayed on the lines in the bottom part of the window.
7. Select the one you need, and click **Show** to view the Contact Card.
8. If you want to see the place where the match was found, on the Contact Search window place the cursor in the **No. of Records** field of the contact you need, and click the drill-down button to the right. The Search Result List appears. You can view the corresponding card (or the list for the Interaction Log Entry) where the match was found by clicking **Show**.

---

***NOTE:** When you search for a contact from the Contact Card or Contact List, you may use an additional functionality. When you select one of the search results in the Contact Search window and click **OK**, the program automatically opens the Contact Card for this contact (if you were searching from the Contact Card); and it opens the Contact List with the contact in question activated (if you were searching from the Contact List).*

---

## Searching for Contacts While Working with Wizards

To search for a contact using the Create To-do, Create Opportunity, and Create Interaction wizards, click the Contact Search icon next to the **Who is the contact?**, **Which contact is involved?**, and **Who are you interacting with?** fields correspondingly. The Contact Search window appears. Then follow the same procedure as for searching for a contact from the main menu (from step 2).

## Entering Search Expressions

A search expression is one or several words that you want the system to use while searching for a contact. The search expression may be either as simple as one descriptive word or more complex: several words (possibly with wild cards) with logical operators. The full list of implemented logical operators and wild card symbols is provided below.

| (logical 'or')

For example, Sonn matt | Design

To search for contacts which have "Sonn matt" or "Design" as part of their fields.

& (logical 'and')

For example, Sonn matt & Design

To search for contacts which have "Sonn matt" and "Design" as part of their fields.

<> (logical 'not')

For example, <> Sonn matt

To search for contacts which do not have "Sonn matt" as part of their fields.

' ' (exact phrase)

For example, Sonn matt Design

To search for contacts which have the exact phrase "Sonn matt Design" in their fields.

? (one unknown character)

For example, S?nn matt

To search for contacts which have "San n matt" or "Sonn matt" and so on as part of their fields.

\* (string of unknown characters)

For example, \*on\*, \*on, on\*

To search for contacts which have texts that contain "on" as part of their fields.

@ (ignore case)

For example, @Sonn matt

To search for contacts which have "sonn matt" or "SONNMATT" and so on as part of their fields.

## Examples

The following extended examples will help you enter search expressions. They will illustrate the most controversial and difficult cases in order to minimize the possibility of making a mistake and to increase the accuracy of your search results.

- The default OR operator

By default, Contact Search finds the contacts that include any of the key words which are entered in the **Find What** field. The contacts containing more matching results will be the first in the list of the search results.

Thus, if you simply type Sonnmatt Design, the system will consider this search expression in the following way: Sonnmatt | Design and will show all contacts that have any of these words.

- The logical And operator

This operator is not a default one. It is used by the program to search for the contacts whose text includes all key words entered in the **Find What** field. Please note that these key words may or may not be located in the same field or in the same record related to the contact. But the position in the search results list will reflect the relevance of each contact – the ones containing matches within the same field or record will be the first in the list.

Thus, if you have entered bicycle & discount, the system will look for these words within the text information of the contact (for instance, the word bicycle may be found in the opportunities, and discount in the interactions involving this contact).

- Case sensitivity by default

The key words entered in the **Find What** field are case-sensitive by default. If you put @ at the beginning of the search expression, you will ask the system not to take letter case into consideration while searching.

For example:

manager – case-sensitive

@manager – case-insensitive

- Exact phrase

The search expression entered (or converted by the program) in single quotes presupposes that the system looks for the exact phrase which should be located in one field of a particular record. The match should reflect the order of the words precisely as they appear in the search expression.

If you type London Light Company, the system will find exactly this phrase, which is located in one field of the contact.

- Search expression optimization:  
To enhance the program's speed while searching, Contact Search has the query optimization function. This feature removes the redundant elements from the search expression.

For example:

If you enter Sonnmatt Design | Sonnmatt, the program will simplify the search expression and will look for Sonnmatt. If you enter Sonnmatt Design & Sonnmatt, the program will search for Sonnmatt Design.

### Incorrect Search Expressions

There are some unacceptable ways of entering search expressions. If you use them, the program will show the Incorrect Query warning message. Following are some examples of an incorrect search expression and their explanation:

- Sonnmatt && Design – only one logical operator is allowed before every key word.
- Sonnmatt <>& Design – wrong order of the phrase components.
- Sonnmatt | \*? – each key word must contain meaningful characters.
- @'london light company' – you may not look for the exact phrase and at the same time ignore the case.
- \*? , @&, \*&, @\* – you may not enter a search expression which consists of the wild cards combination only.
- @sonnmatt@design – you may not use wild cards (@) in the middle of a search word.

### Search Tips

- If you are not familiar with logical operators, wild cards, and syntax rules of Contact Search, use the Query Details window to facilitate building a search expression.
- Be careful when entering just a number of words in the **Find What** field. This may cause the system to find too many results.
- If you received too many results, try activating **Exact Match** (choose the corresponding check box on the Contact Search window).
- If you are not sure about the spelling of the word, do not use the **Exact Match** function. In this case, the program will search for all approximate matches (for example, the words that sound or are spelled alike).
- Try to avoid using the logical NOT operator in combination with wild cards (that is, when the **Exclude** check box on the Query Details window is selected). It is a time-consuming operation.

### Test Your Skills – Finding a Contact

**Scenario:** You are going to talk to a customer about an opportunity connected with “new tables.” You remember that there is information about this opportunity in the system. Try to find the contact using this information.

When on the phone, you ask the person to give you her name. You are not sure about the spelling of the last name, but his first name is Pete. Use this additional information to find the contact you need.

## Searching for Duplicates

If you selected the **Autosearch for Duplicates** check box in the Relationship Management Setup window, the program will automatically search for possible duplicates each time you create a new contact company (see “Duplicate Search”).

If you have synchronized contacts with customers, vendors, and bank accounts, then when you create a new customer, vendor, or bank account, the program automatically creates a new contact and searches for duplicates.

### Searching for Duplicates Manually

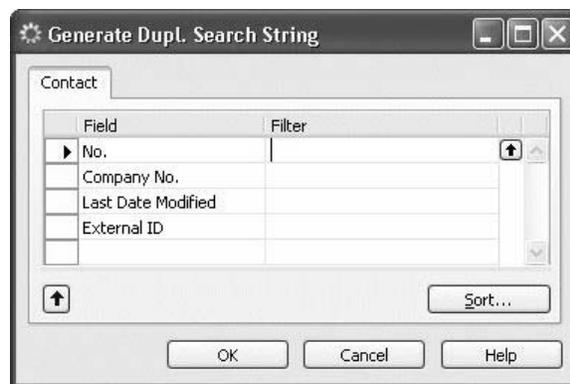
If you have not selected the **Autosearch for Duplicates** check box in the Relationship Management Setup window, you may want to do it manually, for example, after you have created a new contact.

### Generating Duplicate Search Strings

The program uses the search strings you have set up in the Duplicate Search String Setup window to search for duplicates. In order for the program to accurately search for duplicate contacts, you must generate an updated list of search strings for the contact companies in the program. This means you must update search strings for already existing contacts and create search strings for newly created contacts.

You can use the Generate Duplicate Search String batch job to manually generate duplicate search strings. To do this, follow this procedure:

1. Click SALES & MARKETING→MARKETING→PERIODIC ACTIVITIES→DUPLICATES→GENERATE DUPLICATE SEARCH STRING.



2. On the **Contact** tab, enter the filters you want to apply to select the contacts you want to generate search strings for.

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**NOTE:** You may want to specify a contact number filter on the **Contact** tab if you want the program only to generate search strings for one specific contact.

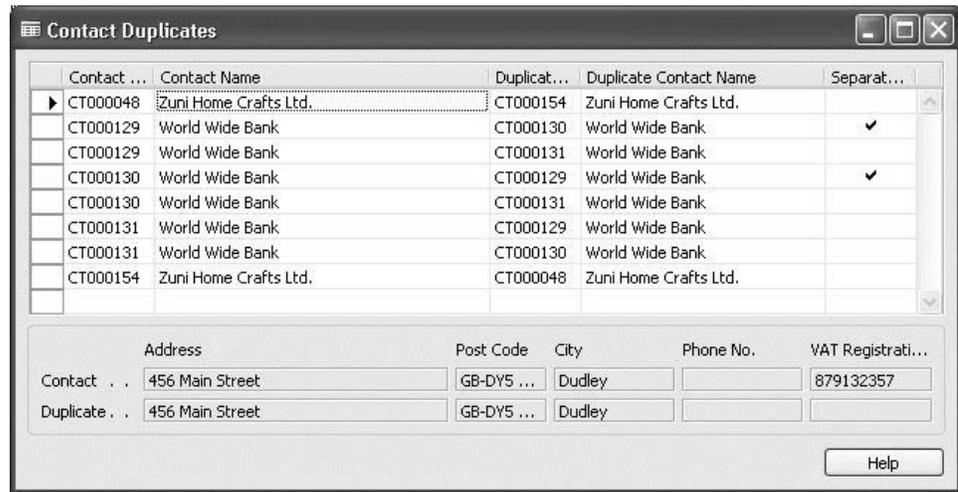
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## Viewing the Duplicates Found

The program uses the search strings you have generated to search for duplicates. If two contacts have a percentage of search strings equal to or greater than the search hit percent you have defined in the Relationship Management Setup window, the program considers the two contacts duplicates.

You can view a list of the duplicates the program has found in the Contact Duplicates window.

To open the Contact Duplicates window, click SALES & MARKETING→MARKETING→PERIODIC ACTIVITIES→DUPLICATES→DUPLICATE CONTACTS.



In the Contact Duplicates window, each line represents one possible duplicate. This means that if a contact has, for example, two possible duplicates, the program will show one line for each of them.

## Handling Duplicate Contacts

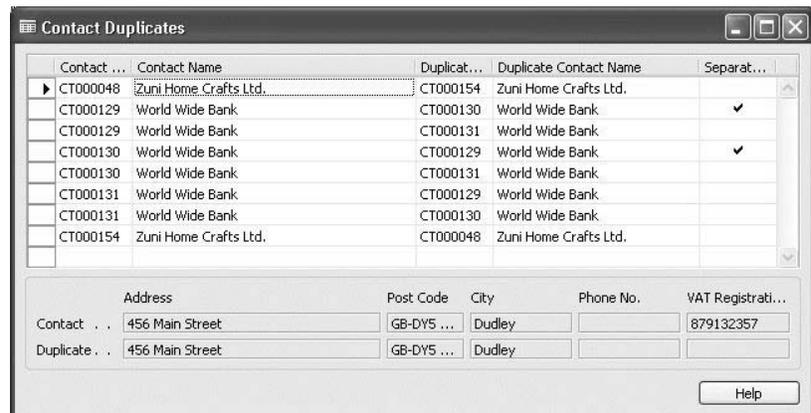
If the two contacts are not true duplicates, but separate contacts, select the **Separate Contacts** check box. When you have specified that the contacts are two separate contacts, the program will not take these two contacts into consideration the next time you run a search for duplicates.

If the two contacts are true duplicates, the program does not automatically remove one of them. Therefore, you may want to do this manually. You do so by deleting the contact card of the duplicate contact.

## Example: Create a Duplicate Contact

To try the duplicate search function, you must deactivate the autosearch function and then create a duplicate contact. Follow this procedure:

1. Click SALES & MARKETING→SETUP→MARKETING SETUP.
2. In the Relationship Management Setup window on the **Duplicates** tab, clear the **Autosearch for Duplicates** check box.
3. Click SALES & MARKETING→MARKETING→CONTACTS. The Contact Card window appears.
4. Press F3 and create a new contact with the following details:  
 Zuni Home Crafts Ltd.  
 456 Main Street  
 GB-DY5-4DJ Dudley
5. Click SALES & MARKETING→MARKETING→PERIODIC ACTIVITIES→DUPLICATES→GENERATE DUPLICATE SEARCH STRING. The Generate Duplicate Search String window appears.
6. Click **OK**.
7. Click SALES & MARKETING→MARKETING→PERIODIC ACTIVITIES→DUPLICATES→DUPLICATE CONTACTS.
8. The new contact and the duplicate contact card appear as duplicates in the Contact Duplicates window:



## Synchronizing Contacts with Customers, Vendors, and Bank Accounts

If some of your contacts are or become customers, vendors, and/or bank accounts, you can synchronize their contact cards with their customer cards, vendor cards, and/or bank account cards. This means that you only have to modify the information in one place. For example, if a contact is also a customer and you have synchronized the contact card with the customer card, then when you change the address on the contact card, the program automatically updates the customer card.

You may want to synchronize your contacts with customers, vendors, and/or bank accounts in the following cases:

- When a contact becomes a customer, vendor, and/or bank account.
- When a contact company has been created both as a contact and as a customer in the Sales & Marketing application area.
- When a contact company has been created both as a contact in the Sales & Marketing application area and as a vendor in the Purchase application area.
- When a contact company has been created both as a contact in the Sales & Marketing application area and as a bank account in the Finance application area.

Before you can synchronize contacts with customers, vendors, and bank accounts, you must specify a business relation code for customers, vendors, and bank accounts in the Relationship Management Setup window.

But you can also manually synchronize your contacts with existing customers, vendors, and bank accounts by:

- Linking contacts with existing customers, vendors, and/or bank accounts.
- Creating contacts as customers, vendors, and/or bank accounts from the contact card.
- Creating contacts from customers, vendors, and/or bank accounts.

After you have set up the synchronization of contacts with customers, vendors, and bank accounts, then each time you create a customer card, a vendor card, or a bank account card, the program automatically creates a contact card for the customer, vendor, or bank account.

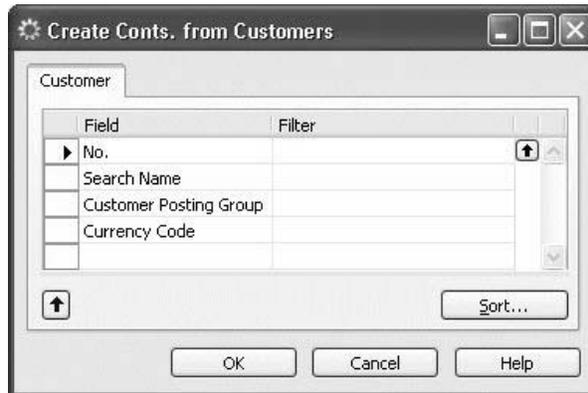
### **Creating Contacts from Customers, Vendors, and Bank Accounts**

If you have set up the synchronization of contacts with customers, vendors, and bank accounts, then each time you create a customer card, a vendor card, or a bank account card, the program automatically creates a contact card for the customer, vendor, or bank account in the Sales & Marketing application area.

If you have created customers, vendors, or bank accounts when the synchronization of contacts with customers, vendors, and bank accounts was not specified, then the program has not automatically created a contact card for the customer, vendor, or bank account. In this case, you can have the program create contacts on the basis of the existing customer, vendor, or bank account data.

The following procedure shows how to create contacts from customers. You can create contacts from vendors and bank accounts by following a similar procedure.

1. Click ADMINISTRATION→IT ADMINISTRATION→CONTACT CREATION→CREATE CONTACTS FROM CUSTOMERS. The Create Contacts from Customers window appears:



2. Set filters if you only want to create contacts from specific customers.
3. Click **OK** to start creating contacts.

The program automatically assigns the business relation code for customers specified in the Relationship Management Setup window to the newly created contact(s).

### Creating Customers, Vendors, and Bank Accounts from Contacts

As the business relationships you have with your contacts evolve, you may want to record them as customers, vendors, and/or bank accounts.

The following procedure shows how to create contacts as vendors. You can create contacts as customers and bank accounts by following a similar procedure.

1. Click SALES & MARKETING→MARKETING→CONTACTS.
2. Select the contact that you want to create as a vendor, and click FUNCTIONS→CREATE AS→VENDOR.
3. Confirm the subsequent message.

The program automatically transfers the contact information from the contact card to the vendor card, but you may also want to add specific vendor information to the vendor card, such as invoicing and payment details.

The program automatically assigns the business relation code for vendors to the contact. To see it, on the contact card, click the **Segmentation** tab, and then click the **AssistButton** to the right of the **No. of Business Relations** field. The Contact Business Relations window appears.

If there is a business relation that is no longer relevant, the program does not automatically remove it. You can do this manually in the Contact Business Relations window.

Check the **General**, **Communication**, and **Foreign Trade** tabs to ensure that the information entered by the program is correct.

## Test Your Skills – Creating a Contact as a Customer

**Scenario:** MultiSport Ltd. has decided to place an order with Cronus. You decide to create this contact as a customer.

1. Create MultiSport as a customer.
2. Delete any business relations that no longer apply to MultiSport.

### Linking Contacts with Existing Customers, Vendors, and Bank Accounts

If you have created both a contact card and a bank account card for the same company, you can link the two cards.

The following procedure shows how to link contacts with bank accounts. You can link contacts with customers and vendors by following a similar procedure.

1. Click SALES & MARKETING→MARKETING→CONTACTS.
2. Select the contact you want to link with an existing bank account, and click FUNCTIONS→LINK WITH EXISTING→BANK.
3. Fill in the Bank Account Link window, and click **OK** to create the link.



In the **Current Master Fields** field, you specify which fields the program should prioritize in case of conflicting information in fields common to the contact card and the bank account card. For example, if the address is different from one card to the other, you can specify by selecting Contact that the valid information is on the contact card.

## Test Your Skills – Linking a Bank Account Card to a Contact Card

1. Create a new contact company by entering the following information:

Contact Name: New Bank of London

A few months later, you realize that the company is already recorded as a bank account in the General Ledger application area, as the New Bank of London.

2. Link the bank account card for the New Bank of London to the contact card for the bank.

### **Deleting Contacts, Customers, Vendors, and Bank Accounts**

If you delete a contact linked to a customer, vendor, and/or bank account, only the contact card is removed from the program. The customer card, vendor card, or bank account card linked to the contact card remains in the program.

To delete a contact, browse to the relevant contact card, press F4, and confirm the subsequent message.

## Test Your Skills – Deleting a Customer Card

A few months later, Mr. Smith at MultiSport has decided not to place an order after all and seems to have lost interest.

1. Delete the customer card for MultiSport, without deleting the contact card.

## Exporting Contacts

You can select a list of contacts from your database and export it to a disk, for example, if you want to send it to an advertising agent.

1. Click SALES & MARKETING→MARKETING→PERIODIC ACTIVITIES→EXPORT CONTACTS. The Export Contact window appears:



2. On the **Contact** tab, enter any filters necessary to select the contacts you want to export.
3. On the **Options** tab, in the **File Name** field, enter the name and path of the file that you want to contain the contact's data.
4. Click **OK** to start exporting.

## Contact Statistics

In the Contact Statistics window, you can see the key figures concerning your contacts. To open the Contact Statistics window, on the contact card, click CONTACT→STATISTICS, or press F9.

## General Tab

In the Contact Statistics window, on the **General** tab, you can see information about the interactions involving the contact. This includes the number of interactions involving the contact, as well as their total cost and duration.

The screenshot shows a window titled "CT000128 New Bank of London - Contact ...". It has two tabs: "General" and "Opportunities". The "General" tab is active. It contains three input fields: "No. of Interactions" with a value of 1 and a dropdown arrow, "Cost (LCY)" with a value of 8.00, and "Duration (Min.)" with a value of 30. A "Help" button is located at the bottom right of the window.

Click the **Assist** button to the right of the **No. of Interactions**, **Cost (LCY)** and **Duration (Min.)** fields to see a list of these interactions in the Interaction Log Entries window.

The screenshot shows a window titled "CT000151 New Bank of London - Interaction Log Entries". It contains a table with the following data:

C.	A.	Date	Interacti...	Description	Attachment	Contact ...	E.	Cost (LCY)	Duration (I)
		05-02-03	BUS	Business letter on monthly pay...	Yes	CT000151	P..	8.00	

Below the table, there are two text boxes: "Contact Name" and "Contact Company Name", both containing "New Bank of London". At the bottom, there are five buttons: "Entry" (with a dropdown arrow), "Functions" (with a dropdown arrow), "Show", "Create Interact", and "Help".

In the Interaction Log Entries window, the program displays one line for each interaction involving the contact. You can see details about each interaction in the different fields of the window. For example, the **Evaluation** field contains the evaluation of the interaction.

You can also find information about the last interactions involving the contact on the contact card in the **Last Date of Interaction** and **Last Date Attempted** fields.



There are five contact-specific reports.

### **Contact – List Report**

With this report, you can print a list of all or some of your contacts. The report provides details about each contact as well as related opportunities and to-dos, and it includes the following information:

- The number, name, address, and type of the contact.
- The number of opportunities involving the contact, as well as their total estimated value and calculated current value.
- The total cost and duration of the interactions involving the contact.
- The next to-do date.

### **Contact – Company Summary Report**

In this report, you can print overall information about contact companies. The report provides details about the company, related interactions and to-dos, and includes the following information:

- The number, name, and address of the contact company.
- A list of the to-dos involving the contact company, including their number, description, date, type, priority, status, and the code of the salesperson or team handling the to-do.
- A list of the interactions involving the contact company, including their entry number, description, date, initiator, information flow, the salesperson handling the interaction, and the number of the to-do that the interaction is linked to.

### **Contact – Person Summary Report**

In this report, you can print overall information about contact people. The report provides details about the person, related interactions and to-dos, and it includes the following information:

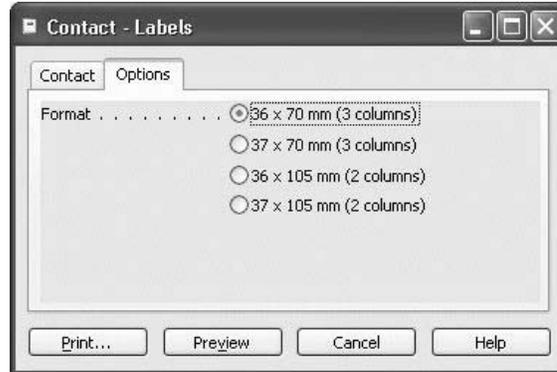
- The number, name, and address of the contact person.
- A list of the to-dos involving the contact person, including her number, description, date, type, priority, status, and the code of the salesperson or team handling the to-do.
- A list of the interactions involving the contact person, including his entry number, description, date, initiator, information flow, the salesperson handling the interaction, and the number of the to-do that the interaction is linked to.

### **Contact – Labels Report**

In this report, you can print labels with the contacts' names and addresses. The report can be used when sending sales and marketing campaign letters, for example.

To open this report, click SALES & MARKETING→SALES→REPORTS→CONTACTS→LABELS.

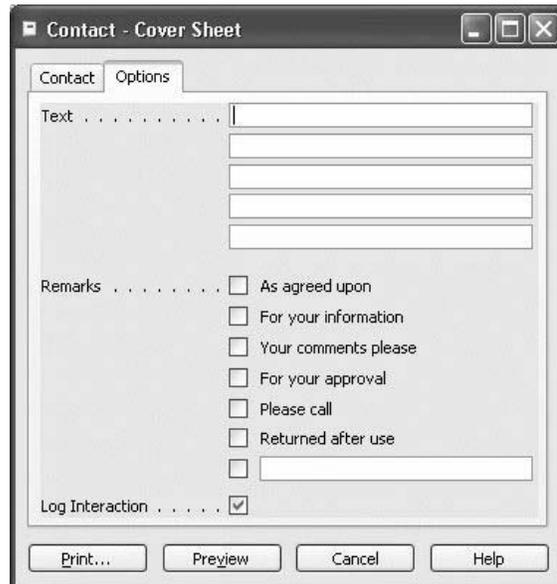
On the **Options** tab, you can select the format you want to use when printing labels for your contacts.



## Contact – Cover Sheet Report

In this report, you can print cover sheets to send to one or more contacts. To open the report, click SALES & MARKETING→MARKETING→CONTACTS. On the contact card, click FUNCTIONS→PRINT COVER SHEET.

On the **Options** tab in the **Text** field, you can enter the text that you want to appear on the cover sheet. In the **Remarks** field, insert a check mark before the relevant option, and/or select the last option to enter your own comment.



The program automatically inserts a check mark in the relevant option on the printed cover sheet.

## Test Your Skills – Chapter Review

1. Create the following contact company in the program:

Rent-a-Bike

123 Main Street

GB-E125TG Edinburgh

Phone No.: 444-555      Fax No.: 444-666

Activities: bicycle renting

VAT Registration No.: 123 654 789

2. After you have created the company, enter the following contact person for that company:

	Rent-a-Bike
Eric Davis Manager	
GB-E12 5TG Edinburgh Phone No.: 444-556      Mobile Phone No.: 222-333	

3. Rent-a-Bike has now become a customer. Record this contact company as a customer and update the business relation.
4. Create Rent-a-Bike as a vendor.
5. Delete the vendor card you have created for Rent-a-Bike.

### **Test Your Skills – Self-Test**

Try entering different types of almost-duplicate contacts, and run the duplicate check. Think about the different ways duplicates could be entered in your organization (such as typos, someone entering a new contact without checking whether it already exists, and so on).

## Quick Interaction: Lessons Learned

Take a moment to write down three Key Points you have learned from this chapter:

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2.

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3.

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