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Online Business Solutions

Contact Management

User Guide
V3.0

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1.0   Module Overview

In Teczo Contact Management, contacts are all of the individuals with whom the user communicates in pursuit of a business opportunity. Contact information can include phone numbers, address, website, email address, company information and other details of an individual. This module, as part of an enterprise's overall customer relationship management, is a central point where all customer contacts are managed. It allows contact information to be routed to appropriate people, contacts to be tracked, and data to be gathered.

In this section, the unique features and user interfaces relating to the Contact Management module will be described including the terminologies used.

2.0   Using the Module

2.1   Contact Management Summary Page

Upon clicking on the Contact Management link in the Teczo home page, the user will be directed to the Contact Management Summary Page which is composed mainly of Filter and Summary Table.

Figure 1: *Contact Management Summary Page*

2.1.1 Contact Management Filter and Search

The table explains terms used in the Contact Management filter.

TERM	DEFINITION
CM	Contact ID A unique contact item number
Any Field Contains	Allows the user to enter keywords of any character string, except date type to be Searched.
State	Indicates the state of the contact item. Values: *(Default Value: All)* • All • Open • On-Hold • Closed • Archived

Frequency	Indicates the frequency of contact. *(Default Value: All)*
Country	Indicates the country where the contact company is located. *(Default Value: All)*
Status	Indicates the current status of the contact item. Values: *(Default Values: All checked)* • Read • Unread • Flag
Date	Allows the users to search for contact items within a specific date range. Values: *(Default Value: All)* • All (instances) • Initiated On • Updated On • Closed On • All (days) • Today • Last 7 days • Last 30 days • Last 90 days • Last 360 days
Person	Allows user to search for contact items involving specific users. Values: *(Default Value: All)* • All (roles) • Initiated By • Immediate Respondent • Our Rep • Updated By • Closed By • All (persons) • List of users

Table 1: *Definition of terms used in the Contact Management Filter*

2.1.2   Contact Management Summary Table

Contact Management summary page will allow the users to view all the contact items they have rights to access.

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A. Terminology

The table explains terms used in the Contact Management summary table.

TERM	DEFINITION
Default Shown Fields	
Updated On	Indicates the date when the contact item was last updated.
Updated By	Indicates the name of the last user who updated the contact item.
CM ID	Contact Management ID A unique contact item number
Contact Name	Indicates the full name of the contact.
Company Name	Indicates the company name of the contact.
Primary Ph	Indicates the primary phone number of the contact.
Ctry	Indicates the abbreviation of the country where the contact company is located.
F	Indicates the frequency of the contact.
Our Rep	Indicates the name of the user's company representative to the contact.
Default Shown Fields	
State	Indicates the state of the contact item. Values: - Open - On-Hold - Closed - Archived
Title	Indicates the position or designation of the contact in their company.
Initiated By	Indicates the name of the user who created the idea of the contact.
Email Address	Indicates the email address of the contact.
Phone (office 1)	Indicates the office phone number of the contact.
Phone (office 2)	Indicates another office phone number of the contact.
Phone (mobile)	Indicates the mobile number of the contact.
Phone (home)	Indicates the home phone number of the contact.

Fax (office)	Indicates the office fax number of the contact.
Postal Address	Indicates the postal address of the contact.
Website	Indicates the website of the contact.
Source	Indicates the source where the user gets the contact.
Source Details	Indicates the detailed information of the source.
Status	Initial letter of the current status of the contact item. Values: • R (Read) • U (Unread) • F (Flag)
C	Indicates the number of comments in the contact item.
Salutation	Indicates the salutation of the contact.
Gender	Initial letter of the gender of the contact.
Immediate Respondents	Indicates the names of the users who are asked to respond immediately.
Keywords	Keywords concerning the contact item
Closed On	Indicates the date when the contact item was closed.
Closed By	Indicates the name of the user who closed the contact item.
Description	Description of the contact
Additional Id	Indicates additional identification that links to the contact item.

Table 2: *Summary Table Terminology*

B. Summary Table

A user is only allowed to view all the contact items they have rights to access. By default, the user can view the summary table with the following fields:

- Updated On
- Updated By
- CM ID
- Contact Name
- Company Name
- Primary Ph (Primary Phone)
- Ctry (Country)
- F (Frequency)
- Our Rep

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Figure 2: *Default Summary Table*

For other generic features of the summary page, they are documented in the Essential Features User's Guide, Section **.

2.2   Contact Management Details

The table explains terms used in the Contact Management details.

TERMS	DESCRIPTION
CM ID	CM ID combined with Contact Name.
Immediate Respondents	Indicates the names of the users who are asked to respond immediately.
Company Name	Indicates the company name of the contact.
Frequency	Indicates the frequency of the contact.
Description	Description of the contact
Attachments	Displays the file names of any files which have been uploaded as attachments to the contact item.
Ctry	Indicates the name of the country where the contact company is located.
Submitted By	Indicates the name of the user who submitted a contact item.
Submitted On	Indicates the date when the contact item was submitted.
Initiated By	Indicates the name of the user who created the idea of the contact.
Updated By	Indicates the name of the last user who updated the contact item.

Updated On	Indicates the date when the contact item was last updated.
Closed By	Indicates the name of the user who closed the contact item.
Closed On	Indicates the date when the contact item was closed.
State	Indicates the state of the contact item. Values: • Open • On-Hold • Closed • Archived
Keywords	Keywords concerning the contact item
Our Rep	Indicates the name of the user's company representative to the contact.
Additional Id	Indicates additional identification that links to the contact item.
Title	Indicates the position or designation of the contact in their company.
Gender	Initial letter of the gender of the contact.
Primary Ph	Indicates the primary phone number of the contact.
Phone (mobile)	Indicates the mobile number of the contact.
Phone (office 1)	Indicates the office phone number of the contact.
Phone (office 2)	Indicates another office phone number of the contact.
Fax (office)	Indicates the office fax number of the contact.
Phone (home)	Indicates the home phone number of the contact.
Email Address	Indicates the email address of the contact.
Website	Indicates the website of the contact.
Postal Address	Indicates the postal address of the contact.
Zip/Postal Code	Indicates the postal code of the contact.
Source	Indicates the source where the user gets the contact.
Source Details	Indicates the detailed information of the source.

Update History	Indicates the recent changes of the contact item details. • Last Update – Date and time when the details were last updated or edited. • Field – Edited or changed fields in the contact item details from the last update.
Update History List	Link to view update history list of all the changes made in the contact item details.
Comments	Comments added by the users that have access rights to the contact item.
Quote	User quotes in a particular comment.
Access Rights	Indicates the names of the users that are allowed to access the contact item.

Table 3: *Contact Management Details Terminology*

For other generic features on the Contact Management details, they are documented in the Essential Features User's Guide, Section **.

2.3   Add/Edit Contact and Comments

System Administrator, 1st Level Member, Submitter, Initiator, Our Rep and Users that have Admin or Delete rights can edit all the fields indicated in the Edit details page of a contact item.

For the full features of Add/Edit Contact and Comments, they are documented in the Essential Features User's Guide, Section **, ** and ** respectively.