



# Contact Management

# **User Guide**

V3.0

www.teczo.com

# **Table of Contents**

Tal	Table of Contents2				
1.0	N	Iodule Overview	3		
2.0	U	sing the Module	4		
2.1		Contact Management Summary Page	4		
	2.1.1	Contact Management Filter and Search	4		
	2.1.2	Contact Management Summary Table	5		
2.2		Contact Management Details	8		
2.3		Add/Edit Contact and Comments10	C		

Page 2 of 10

# 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.

Page 3 of 10

# 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.

iline E	Business Solutions		Home	General Product Develo	opment Sales & Marketing Operations &	Administration System	Lo	gged on as	Suresh on 29Mar2
Sear	ch CM D	Go Any	Field Contains		Search Reset				Advanced Search
All (4	<b>40)</b> Open (39)	On-Hold (0) Clo	osed (1) Archiv	red (0) Action	• More Actions •				Add Contact
	Updated On	Updated By	CM ID	Contact Name	Company Name	Primary ph	Ctry	F	Our Rep
	Open								
	02Feb10	Joshua Garcia	CM000015	Margaret Hill	Yonge Electronics	416-233-9880	CA	High	Joshua Garcia
3	02Feb10	Joshua Garcia	CM000040	Jacob Lewis	Lewis and Co	212-303-8599	US	Low	Joshua Garcia
	02Feb10	Oliver Smith	CM000035	Alfie Wilson	AU79 Batteries	(44) 20-4534-6789	GB	Low	Daniel Brown
1	02Feb10	Lucas Müller	CM000032	Lukasz Kowalski	ZHKQZ Baterii	(48) 22-4358716	PL	High	Daniel Brown
1	02Feb10	Shunde Li	CM000029	Yayati Sharma	IT Circuitry	(91) 80-24471122	IN	High	Karan Basha
1	02Feb10	Karan Basha	CM000027	Parthasarathy Ali	Department of Electronics (Gov)	(91) 80-92838763	IN	Low	Karan Basha
3	02Feb10	Harry Williams	CM000001	James Thomas	ELE Electronics	415-453-2345	US	Medium	Daniel Brown
1	25Jan10	Harry Williams	CM000021	Chloe Petit	château électronique	(33) 3-30094230	FR	Medium	Oliver Smith
1	25Jan10	Lucas Müller	CM000017	Songde Liu	Liaoma Dianqi (溜馬電器)	(86) 21-34459032	CN	Medium	Shunde Li
1	25Jan10	Lucas Müller	CM000018	huging Zheng	Liaoma Diangi (溜馬電器)	(86) 21-67830120	CN	Low	Shunde Li

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				
СМ	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: <i>(Default Value: All)</i> • 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: <i>(Default Values: All checked)</i> • Read • Unread • Flag			
Date	Allows the users to search for contact items within a specific date range. Values: <i>(Default Value: All)</i> • 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: <i>(Default Value: All)</i> • 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.

#### 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.		
	Initial letter of the current status of the contact item.		
Status	Values:		
	<ul> <li>R (Read)</li> <li>U (Unread)</li> <li>F (Flag)</li> </ul>		
С	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

Ì	Updated On	Updated By	CM ID	Contact Name	Company Name	Primary ph	Ctry		Our Rep
	Open								
Ŭ.	02Feb10	Joshua Garcia	CM000015	Margaret Hill	Yonge Electronics	416-233-9880	CA	High	Joshua Garcia
	02Feb10	Joshua Garcia	CM000040	Jacob Lewis	Lewis and Co	212-303-8599	US	Low	Joshua Garcia
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	25Jan10	Lucas Müller	CM000018	huging Zheng	Liaoma Diangi (溜馬電器)	(86) 21-67830120	CN	Low	Shunde Li

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.

	Indicates the recent changes of the contact item details.						
Update History	<ul> <li>Last Update – Date and time when the details were last updated or edited.</li> <li>Field – Edited or changed fields in the contact item details from the last update.</li> </ul>						
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, 1<sup>st</sup> 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.