Contacts Module

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# View List of Contacts

**Functional Description**

This view displays one or more Contacts in tabular form.

**Fields**

No change

**Actions or Controls**

No change

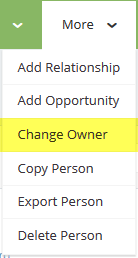
**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| More | Dropdown | If one or more records are selected  Options include:   1. Add Relationship 2. Add Opportunity 3. Change Owner 4. Copy Contact (if only one record is selected) 5. Export Contacts 6. Delete Contacts |

**Exceptions**

None

**Notes and Issues**



# View Contact (Individual)

**Functional Description**

View Contact allows the User to view an existing Contact’s information including: contact info; level of engagement; next action; associated contacts; a history of actions and updates; and associated files.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| **Contact Details (Tab)** | | | |
| Created by | Text | Display as:  “Created by [User Name] on [Creation Date]” |  |
| Creation Date | Text | Used above |  |
| Owned by | Text | Display as:  “Owned by [User Name]” |  |

**Actions or Controls**

No Changes

**Navigation Options**

No Changes

**Exceptions**

None

**Notes and Issues**

None

# View Contact (Company)

**Functional Description**

View Contact allows the User to view an existing Contact’s information including: contact info; level of engagement; next action; associated contacts; a history of actions and updates; and associated files.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| **Contact Summary** | | | |
| Employees | Link | Display as ‘[# of employees] People’  If # = 0, then do not display  If # = 1, then link to Contact record for the Contact  If # > 1, then link to Contact List filtered to display those Contacts |  |
| **Opportunity Summary (Right Sidebar)**  **NOTE: If Opportunities is configured where Customers are primarily Companies** | | | |
| Number of Won Opportunities | Link | Count the number of Opportunities where Stage = Won  Link to Search results containing a list of Opportunities Won for this Contact |  |
| Value of Won Opportunities | Text | Sum the value of Opportunities where Stage = Won  Link to Search results containing a list of Opportunities Won for this Contact |  |
| Number of Potential Opportunities | Link | Count the number of Opportunities where Stage = Won  Link to Search results containing a list of Opportunities Won for this Contact |  |
| Value of Potential Opportunities | Text | Sum the value of Opportunities where Stage = Won  Link to Search results containing a list of Opportunities Won for this Contact |  |
| **Contact Info (Tab)** | | | |
| Created by | Text | Display as:  “Created by [User Name] on [Creation Date]” |  |
| Creation Date | Text | Used above |  |
| Owned by | Text | Display as:  “Owned by [User Name]” |  |

**Actions or Controls**

No changes

**Navigation Options**

No changes

**Exceptions**

None

**Notes and Issues**



# Add or Edit Contact (Individual)

**Functional Description**

This view allows the User to record details about a Contact.

The view is substantially similar to the Contact Tab detailed in [View Contact](#_View_Contact).

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Owner\* | Textbox | Live search of all Users  Prepopulate with current User |  |

**Actions or Controls**

No changes

**Navigation Options**

No changes

**Exceptions**

None

**Notes and Issues**

None

# Add or Edit Contact (Company)

**Functional Description**

This view allows the User to record details about a Contact.

The view is substantially similar to the Contact Tab detailed in [View Contact](#_View_Contact).

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Owner\* | Textbox | Live search of all Users  Prepopulate with current User |  |

**Actions or Controls**

No changes

**Navigation Options**

No changes

**Exceptions**

None

**Notes and Issues**

None

# Add Relationship

**Functional Description**

This view allows the User to associate Contacts with each other and define their relationship.

This view only applies to People Contacts.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Contact\* | Textbox | Use live search pattern to select Contacts as the User types  Only return Contacts—do not include Users |  |
| Relationship\* | Dropdown | Default options include in this order:   1. ~~Account Executive~~ 2. Spouse 3. Agent 4. Lawyer 5. ~~Co-buyer~~   Default to the next type when adding another relationship |  |
| ~~Add or replace Account Executive?~~ | ~~Dropdown~~ | ~~Reveal if the User selects ‘Account Executive’ from the Relationship type field.~~  ~~Default options include in this order:~~   1. ~~[blank]~~ 2. ~~Add Account Executive~~ 3. ~~Replace existing Account Executive~~ |  |

**Actions or Controls**

No change

**Navigation Options**

No change

**Exceptions**

None

**Notes and Issues**

None

# Change Owner

**Functional Description**

This view allows the User to change the Owner of multiple Contact.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| New Owner\* | Textbox | Live search of all Users  Prepopulate with current User |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Change Owner | Button |  |  |
| Cancel | Button |  |  |

**Navigation Options**

Not applicable

**Exceptions**

None

**Notes and Issues**

