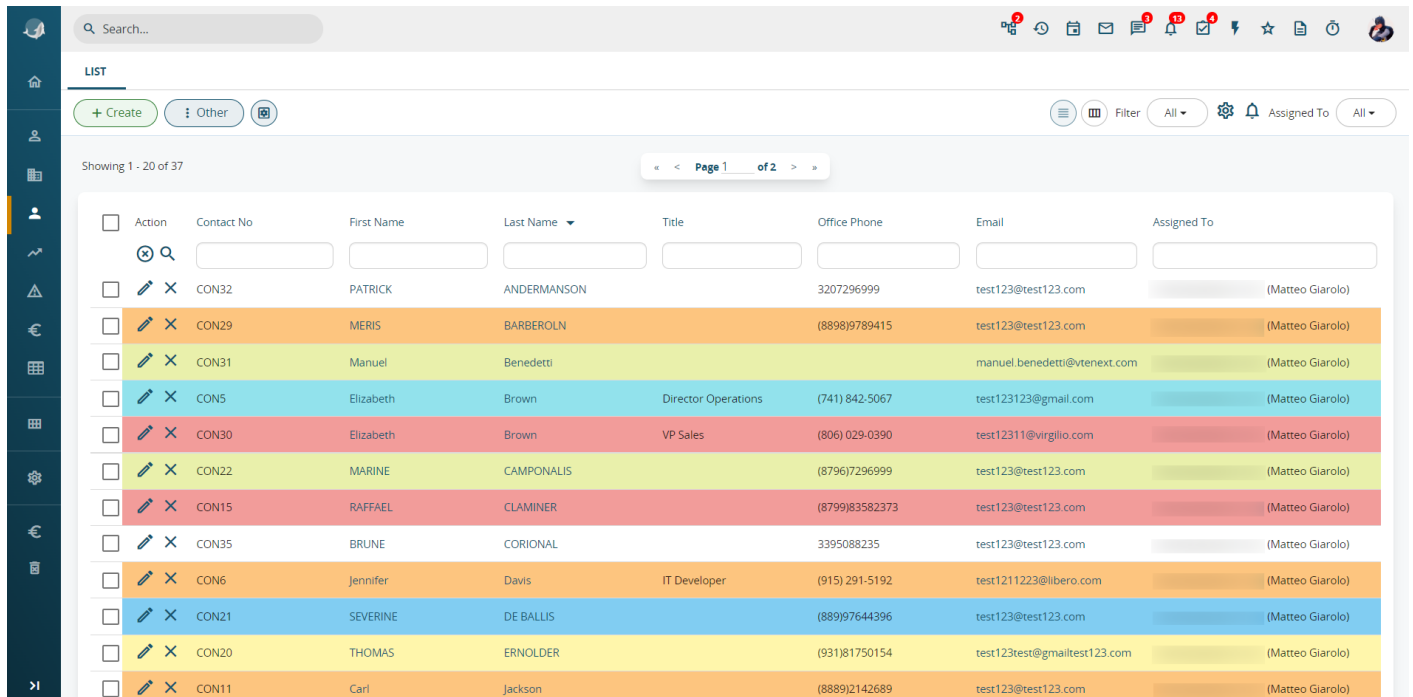


3.3 Contacts


Contacts contains the lists of the physical persons with whom relations have been established:

- account contact persons (customers, partners, or other type);
- private customers (or potentials) who generally come from a lead conversion;
- vendor contact persons.



The screenshot displays the 'LIST' view of the Contacts application. At the top, there is a search bar and a navigation bar with various icons. Below the navigation bar, there are buttons for '+ Create', ': Other', and a grid icon. The main content area shows a table of contacts with columns for Action, Contact No, First Name, Last Name, Title, Office Phone, Email, and Assigned To. The table is paginated, showing 'Page 1 of 2' and 'Showing 1 - 20 of 37'. The contacts are listed in a table with alternating row colors (orange, yellow, blue, red, green, etc.). Each row includes an 'Action' column with edit and delete icons, and an 'Assigned To' column with a dropdown menu.

Action	Contact No	First Name	Last Name	Title	Office Phone	Email	Assigned To
<input type="checkbox"/>	CON32	PATRICK	ANDERMANSON		3207296999	test123@test123.com	(Matteo Giarolo)
<input type="checkbox"/>	CON29	MERIS	BARBEROLN		(8898)9789415	test123@test123.com	(Matteo Giarolo)
<input type="checkbox"/>	CON31	Manuel	Benedetti			manuel.benedetti@vtenext.com	(Matteo Giarolo)
<input type="checkbox"/>	CON5	Elizabeth	Brown	Director Operations	(741) 842-5067	test123123@gmail.com	(Matteo Giarolo)
<input type="checkbox"/>	CON30	Elizabeth	Brown	VP Sales	(806) 029-0390	test12311@virgilio.com	(Matteo Giarolo)
<input type="checkbox"/>	CON22	MARINE	CAMPONALIS		(8796)7296999	test123@test123.com	(Matteo Giarolo)
<input type="checkbox"/>	CON15	RAFFAEL	CLAMINER		(8799)83582373	test123@test123.com	(Matteo Giarolo)
<input type="checkbox"/>	CON35	BRUNE	CORIONAL		3395088235	test123@test123.com	(Matteo Giarolo)
<input type="checkbox"/>	CON6	Jennifer	Davis	IT Developer	(915) 291-5192	test1211223@libero.com	(Matteo Giarolo)
<input type="checkbox"/>	CON21	SEVERINE	DE BALLIS		(889)97644396	test123@test123.com	(Matteo Giarolo)
<input type="checkbox"/>	CON20	THOMAS	ERNOLDER		(931)81750154	test123test@gmailtest123.com	(Matteo Giarolo)
<input type="checkbox"/>	CON11	Carl	Jackson		(8889)2142689	test123@test123.com	(Matteo Giarolo)

It is preferable to create a new contact from a lead as described above; however it may sometimes be necessary to add a new contact directly. In this case, always click on the  button

Creating Contact Save Cancel

INFORMATIONS **GDPR**

Contact Information

First Name

Last Name

Account Name

Lead Source

Title

Department

Email

Assistant

Assistant Phone

Contact No

Office Phone

Mobile

Home Phone

Other Phone

Fax

Date of birth

Reports To

Below some relevant fields in Contacts:

Report to	Link to another contact, e.g. superior in the company.
Do Not Call	Tick the flag if you want the contact to not be called; this is for simple information purposes and is not linked to automatic functions or blocks.
User Portal	Enables the contact to access the vtenext Customer Portal (see dedicated chapter): when the contact is saved, the system will send an email with the credentials.
Support Start and End Date	Defines the vtenext Customer Portal access expiry date.

vtenext is equipped with a parallel customer service tool called Customer Portal.

Customer Portal Information

Portal User ☒

Support Start Date

(dd-mm-yyyy)

Provides contacts with limited access to Trouble Ticket functions: opening of new Tickets, sharing documents, etc.

To change the template of the email used to send the credentials, go to Settings > Email template > Registration and access data.

ANONYMIZE: in the new release, clicking on the “Other” button provides access to the “Anonymize” option. This feature has been created to manage leads according to GDPR rules. Anonymized Leads and Contacts cannot be restored.

Revision #3

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