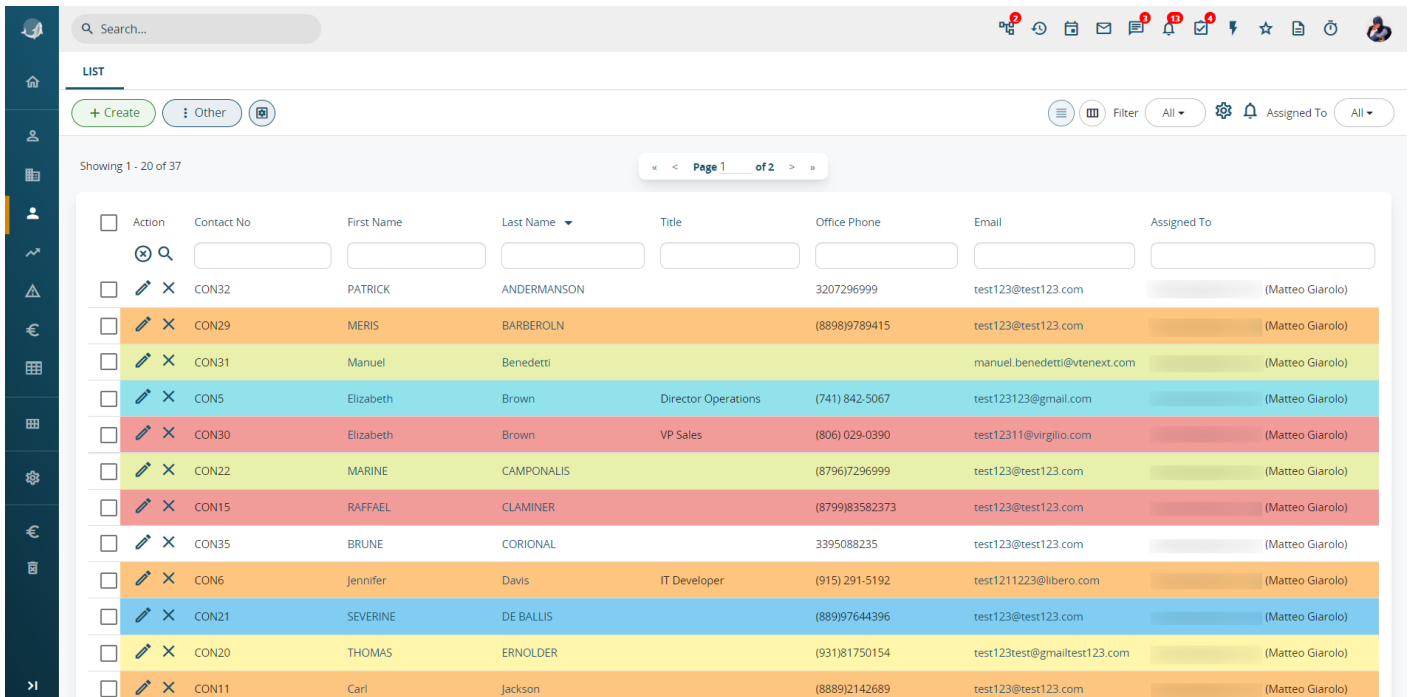



3.3 Contacts

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.



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

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.

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.

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