Enterprise \ Contacts
Overview

The Contacts module allows a record of external contacts and their parent companies within the Prism database. These contract records can be used in reports and analytics, and contacts can be granted Prism User rights just like employees.

When you first enter the Contacts module you see the Overview page detailing the number of contact and company records in the directory.

Contacts
Search

The search page shows a list of all existing contacts configured in the system. From here you can filter contacts and select one to view or edit the Detail page. For grid controls see common features.

Create

Contact creation is run through a process with six stages.

Stage 1 allows you to enter Personal details. Most fields are optional, but a Full Name and Display Name are required. An External Key can be added if an external database is likely to be in use.

Stage 2 contains contact specific detail; nothing is required at this stage. If a new contact is the first from a Company, then a new Company can be added at this point with the '+' button.
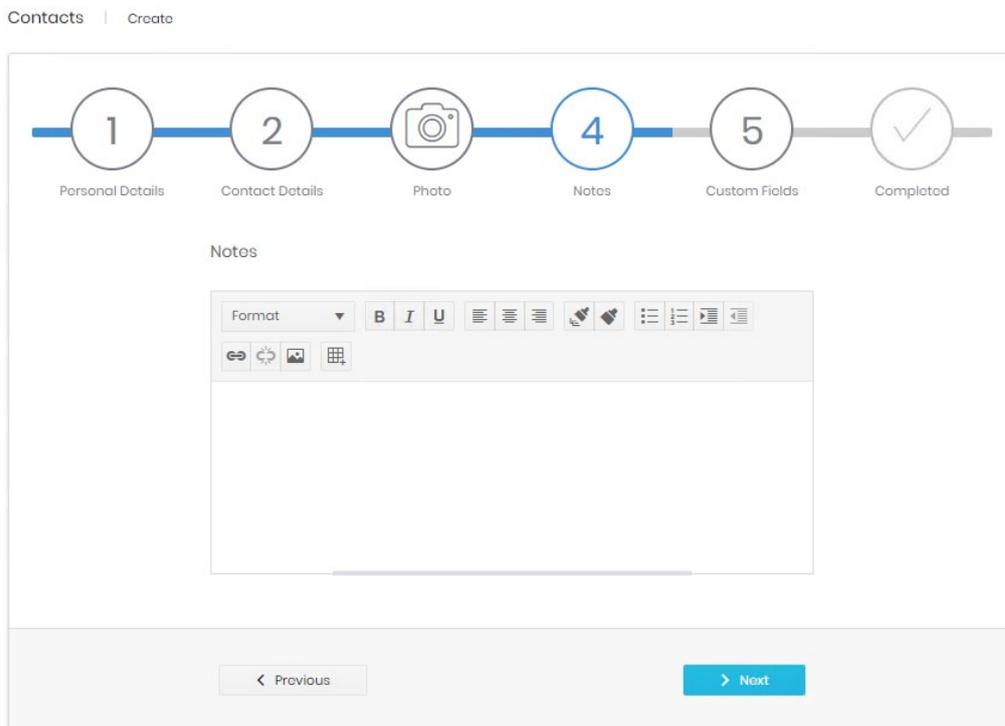
Step 3 allows you to upload and manipulate a picture to use on the record.
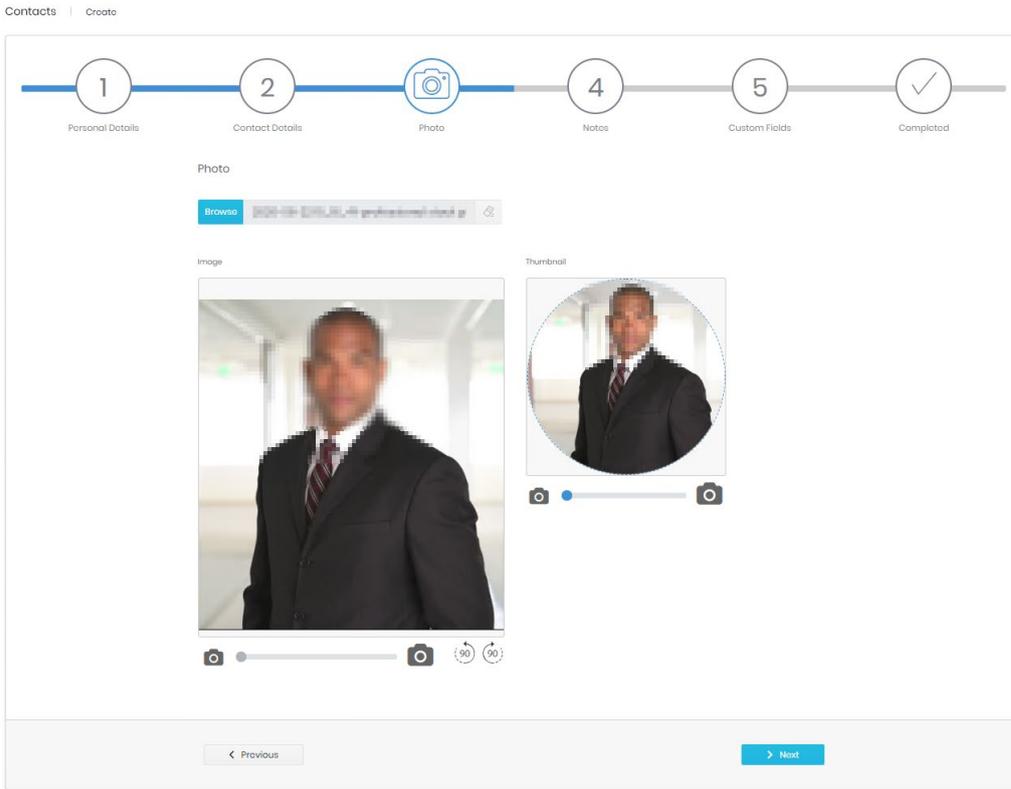
Stage 4 allows for Notes to be added on the Contact. This is free, formatted text and can include links, tables, and pictures.

Stage 5 shows any custom fields that have been enabled for Contact record in Settings. If no fields are enabled, this stage is skipped.

The final step shows a summary of the details entered, allowing final confirmation before the record's creation.

### Recycle Bin

The Recycle bin page looks very similar to the search page and has all the same controls plus an additional one. This button will restore the deleted Contact.

Detail Page

The detail page for a contact displays all relevant information configured against the record. It includes defined personal (1) and company/contact information (2), any notes and values entered against the custom fields that can be configured by a system administrator (3 and 4).
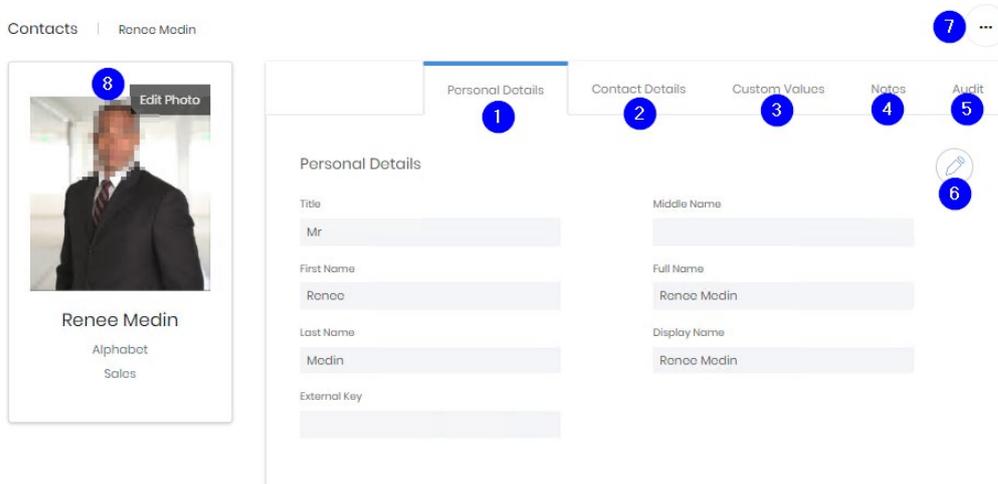
The 5th tab (5) shows audit information including the creator and last modifier of the record, as well as the dates of creation and modification.

Each tab has an edit button (6) which allows the information on that tab to be modified. Once on the edit page there are thee further controls

Save changes (1) – submit changes and return to the details page

Reset changes (2) – discard any changes but stay in edit mode

Cancel (3) – discard any changes and return to the details page

Above the tabs on the page is the ellipsis icon (7). This contains the delete command. Once confirmed the site is deleted and moved into the Recycle Bin.
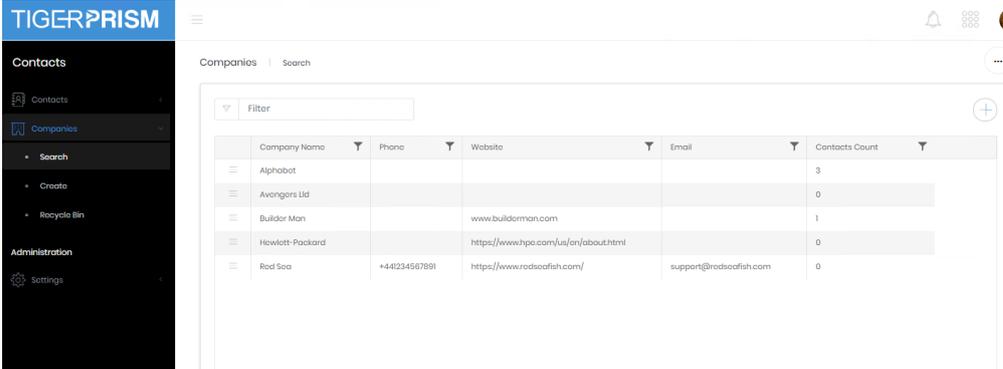
The employee picture on the details page can be edited (8). Either a new image can be selected, or the existing one can be zoomed, panned or cleared as required.

Additionally, the contact detail page shows present and historical UC assignment information.

Companies

Search

The search page shows a list of all existing companies configured in the system. From here you can filter companies and select one to view or edit the <u>Detail</u> page. For grid controls see common features.
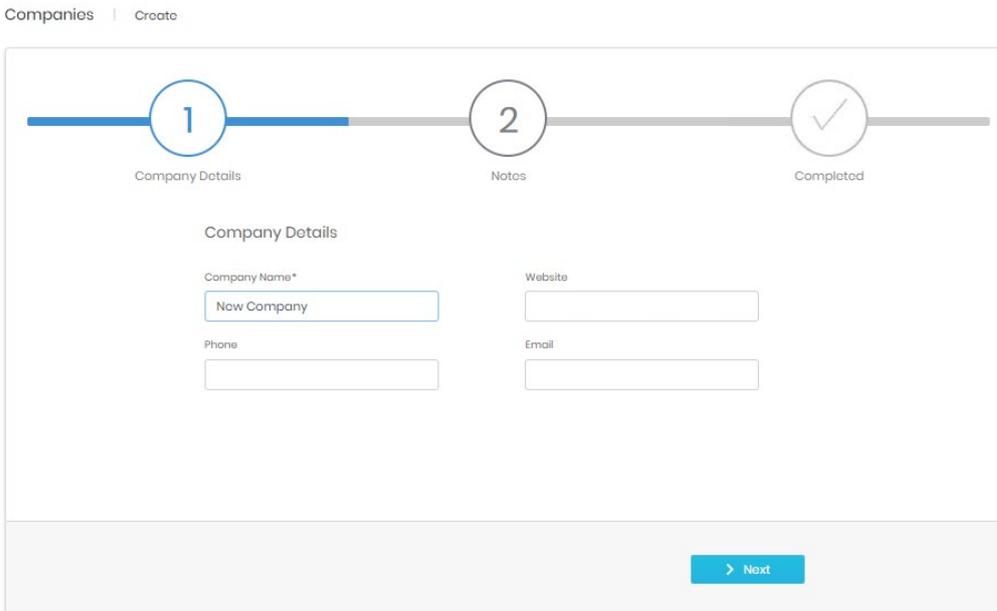

Create

Company creation is run through a process with three stages.

Stage 1 takes the basics of the company, name, website and generic contact details.

Stage 2 allows for Notes to be added on the company. This is free, formatted text and can include links, tables, and pictures.

The final step shows a summary of the details entered, allowing final confirmation before the record's creation.

Recycle

The Recycle bin page looks very similar to the search page and has all the same controls plus an additional one. This button will restore the deleted Company.

Detail Page

The detail page for a contact displays all relevant information configured against the record. It includes defined personal (1) and company/contact information (2) and any notes (3).
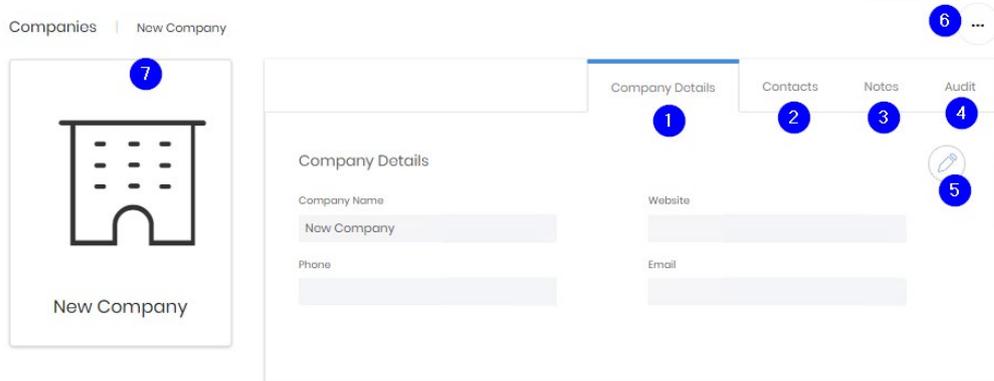
The 4ᵗʰ tab (4) shows audit information including the creator and last modifier of the record, as well as the dates of creation and modification.

Each tab has an edit button (5) which allows the information on that tab to be modified. Once on the edit page there are thee further controls

Save changes (1) – submit changes and return to the details page

Reset changes (2) – discard any changes but stay in edit mode

Cancel (3) – discard any changes and return to the details page

Above the tabs on the page is the ellipsis icon (6). This contains the delete command. Once confirmed the site is deleted and moved into the Recycle Bin.

The company picture on the details page can be edited (7). Either a new image can be selected, or the existing one can be zoomed, panned or cleared as required.

Administration - Settings
Contacts

These settings are only available to system administrators. There are two tabs available.

Titles

Titles allow you to configure the dropdown for an contact's salutation. The list comes preconfigured with common titles (Mr, Mrs etc) but others can be added if required. A title cannot be destroyed until no employees or contacts are using it.

Custom fields

Enabled Custom fields appear in the details page for every contact.

Editing Custom Fields

These fields can have any label the administrator adds, and these fields can be populated manually or by Integration.

Three of the maximum 8 fields have been enabled for users to see, and those two have been labelled appropriately for a specific purpose.

1. Click on the label to edit the line directly.
2. Click on the tick or cross once to enter in line editing, then tick or untick the box to enable or disable the field for users.
3. Click and drag on the handle to reorder the fields.

Save when changes are complete.

Note

If no custom fields are marked 'Is visible' then a Custom Values tab will not appear in either the creation wizard or the detail page for employees. Integration will continue to populate values in those fields when they are not visible.