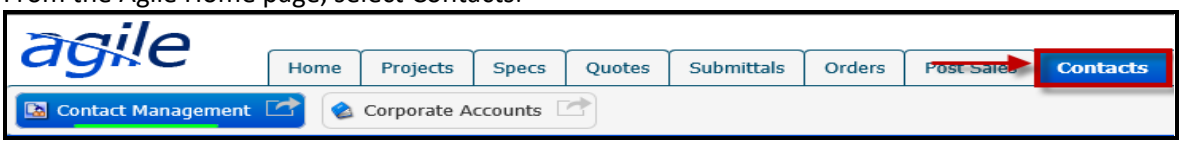
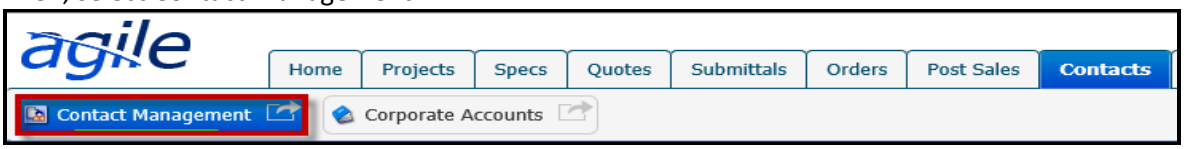
Accessing Contact Management

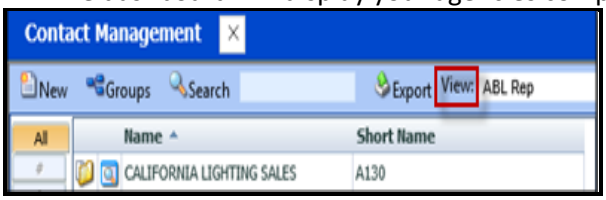
From the Agile Home page, select Contacts.



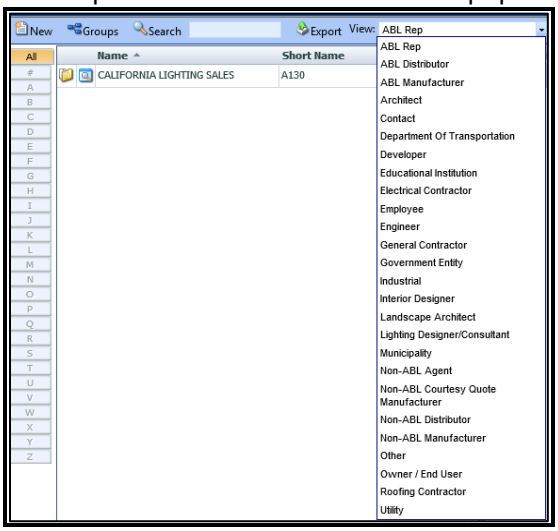
Then, select Contact Management



- The dashboard will display your agencies company record by default.



- You can also filter the dashboard to show additional company/individual types by selecting the type from the **View** drop down and the dashboard will populate with records for the specified type.

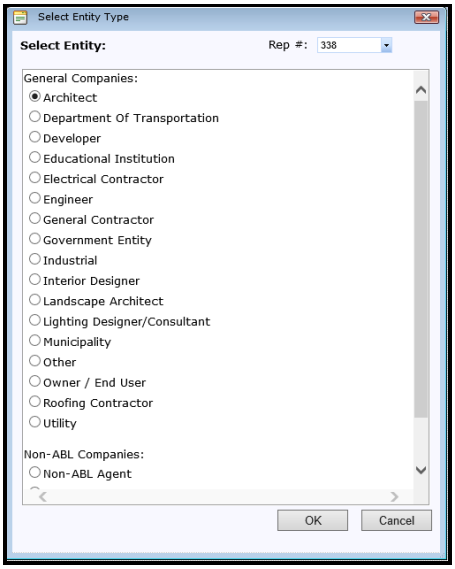


Creating a New Company

- Click the **New** button 

from the contact management dashboard. Pick the entity type and click **OK**:

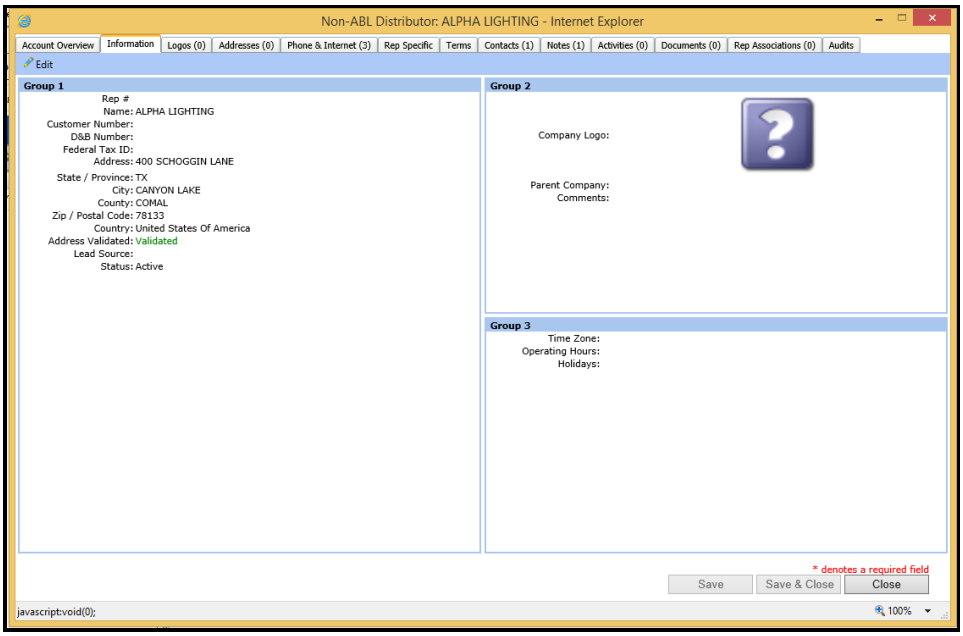
Revised: 5/22/2019



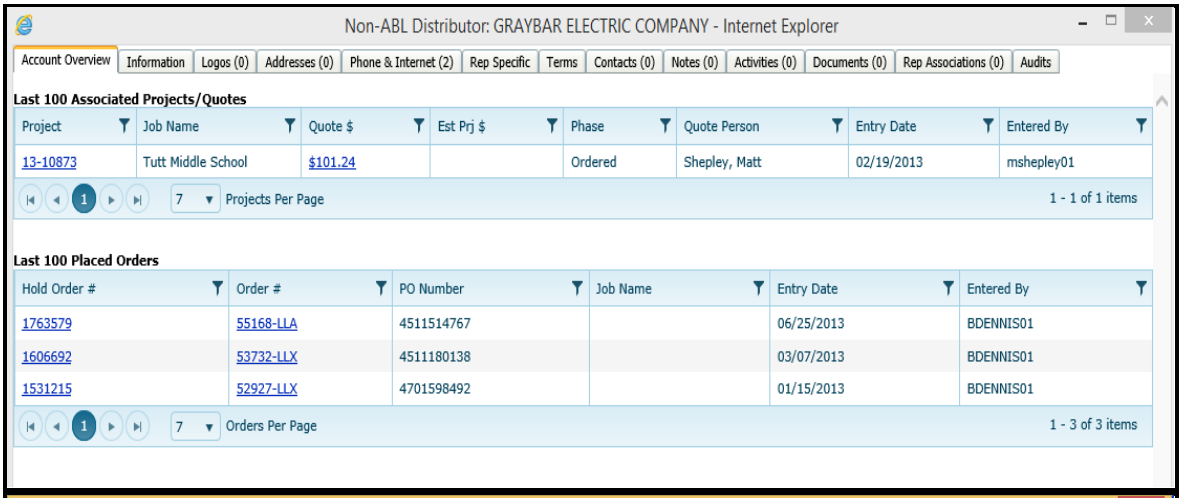
(Note: The information required and tabs available at time of entry will vary based on the type of company or firm type chosen).

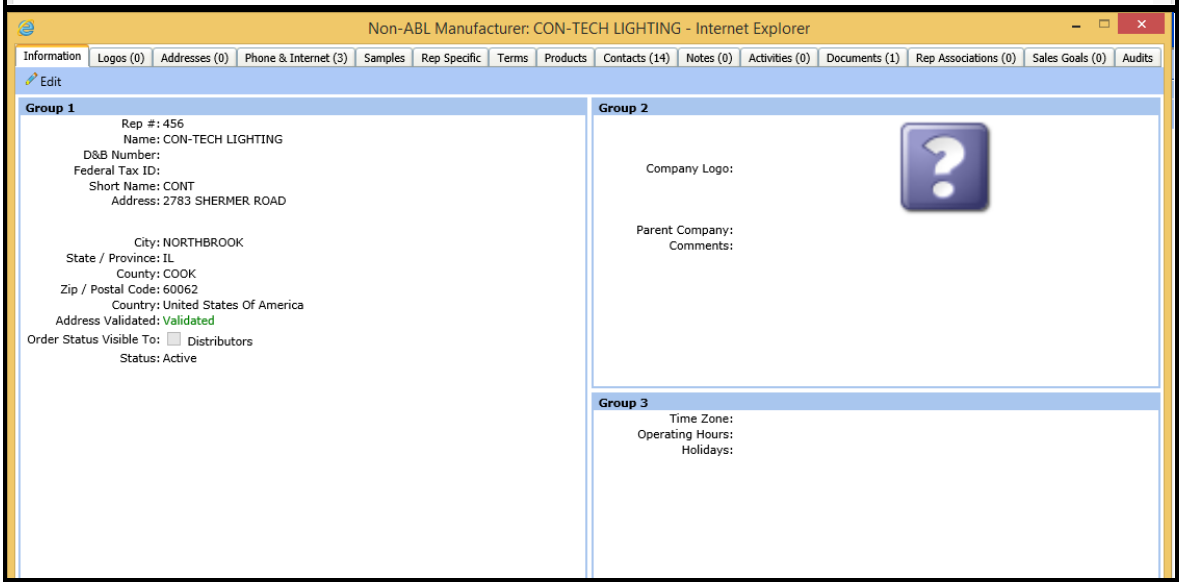
Enter new company/individual information and any fields that have a red (*) asterisk is required to be completed.

- Click Save



Below is an overview of the tabs within the Contact for Non-ABL Distributor and Manufacturer:



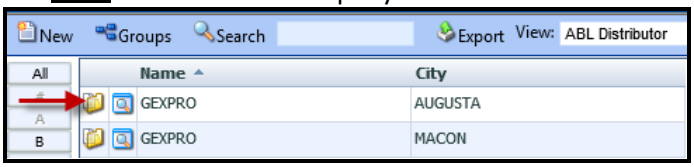


- **Account Overview** – allows you to see the Last 100 Associated Projects/Quotes and the Last 100 Placed Orders
- **Information** – contains the general contact information, address, and company information
- **Logos** – allows you to upload logos (the logo can be set as a main logo, print logo or web logo). The print logo will appear on orders, quotes and submittals.
- **Addresses** – allows you to enter additional alternate addresses associated with this contact
- **Phone & Internet** - contains phone numbers, an email address and/or web link for the contact
- **Samples (Non-ABL Manufacturer)** – allows you to add product samples
- **Rep Specific** – (**Non-ABL Distributor**) allows you to set an in/out of territory flag, customer rank notation, add any specific lines stocked by manufacturer & promotions. (**Non-ABL Manufacturer**) allows you to enter release types, if buy/sell is allowed, standard lead times as well as commission percentages
- **Terms** – **(Non-ABL Distributor)** allows you to enter any payment terms. (**Non-ABL manufacturer**) allows a user to enter payment terms, returns policies, warranty info, freight terms, and minimum dollar order amounts
- **Notes** – allows you to create new notes specific to this contact and also mark them critical which will prompt you with a message anytime this contact record is opened
- **Activities** – allows you to add a new task or event. You can hide them once completed, mark them completed and/or delete the activity
- **Documents** – allows you to link/upload a new document specific to this company

- **Rep Associations** – allows you to add an employee to this contact, any time this contact is added to a project the employee associated will be added as well
- **Sales Goals (Non ABL Manufacturer)** – allows you to add or edit sales goals based on year and can also be shown by dollars per month for the calendar year
- **Audits** – shows any information that has been added or deleted from the record

Accessing contact record

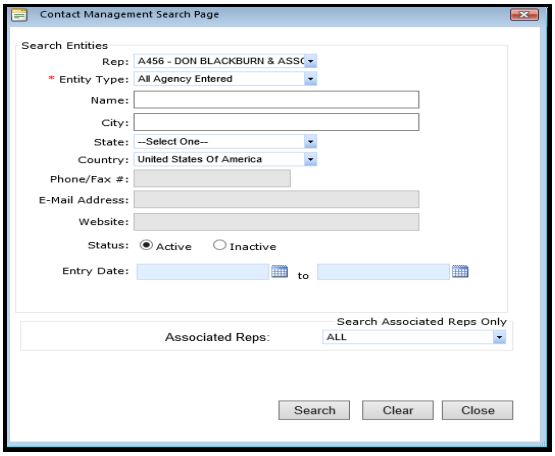
- To open, click on the folder which will display the information on that contact record. Clicking the quick view icon  will show the company information



Searching for Contacts

- From the dashboard, select the 

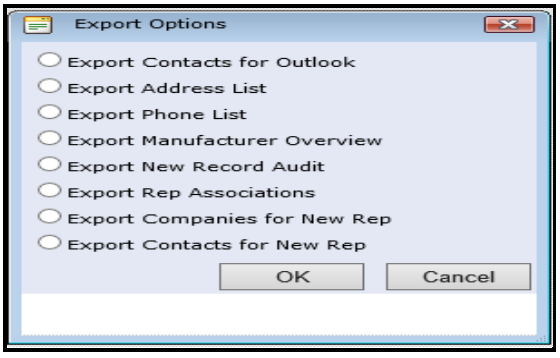
button and the below window to allow you to search for active/inactive contacts based on entered criteria:



Exporting Contacts

- From the dashboard, you select the 

button which provides options you can export to an excel file (.csv):

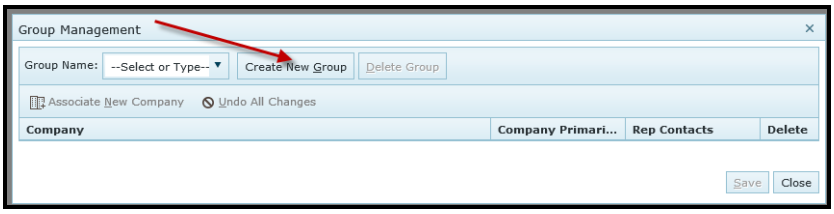


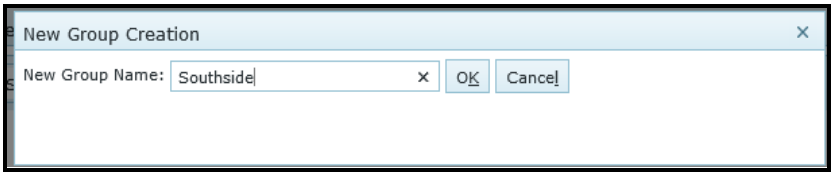
- **Contacts for Outlook** – exports first/last name, job title, company name, address, phone numbers, email addresses

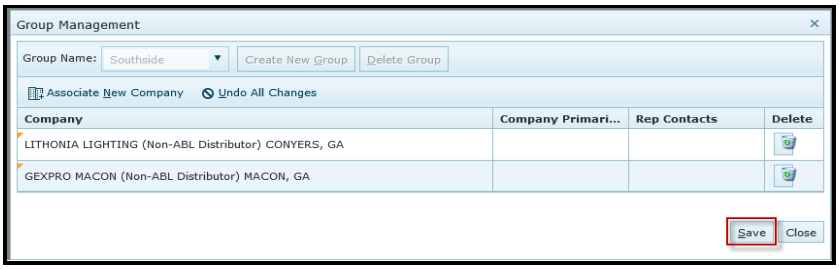
- **Address List** – exports company name, address to include city, state & zip or postal code
- **Phone List** – exports phone numbers
- **Manufacturer Overview** – exports name, payment terms, freight terms, order minimums, commission percentages, etc.
- **New Record Audit** – exports any new companies/contacts that were created by your agency
- **Rep Associations** – exports entity type, employee, company, addresses, phone numbers & email address
- **Companies for New Rep** – export contacts entered by your company
- **Contacts for New Rep** – export contacts entered by your company

Managing Groups

- Creating a new group
    - Click the Groups button from the contact management dashboard. Choose **Create New Group** and name the group (ex. Southside) then select **Associate New Company**. This feature allows you to group companies who often work together. When you add the group to a quote or order, all associated companies will now appear in the contacts tab.







- Deleting a group:
    - Click the Groups button from the contact management dashboard. Choose **Delete Group**, this feature allows you to delete an existing group.

