Shared Contacts User Guide

Overview

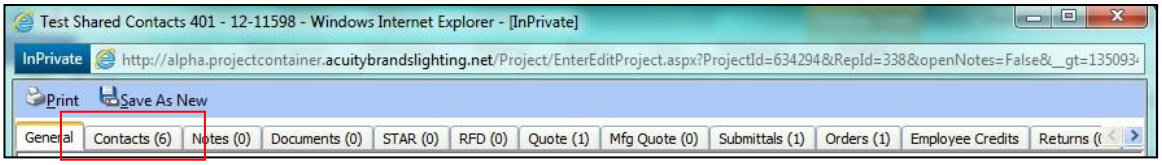
Shared Contacts ties into existing Contact Management records allowing for the association of companies and contacts to Projects, Quotes, and Orders. Shared Contacts provides the ability to show company relationships for projects and orders. In addition, access to Quick Views of company and contact details provides the ability to quickly add companies and contacts not in Contact Management.

With Shared Contacts, users can:

- Add Companies and Contacts
- Manage Company Relationships for Distributors and Contractors
- Quick View and Quick Add companies and contacts

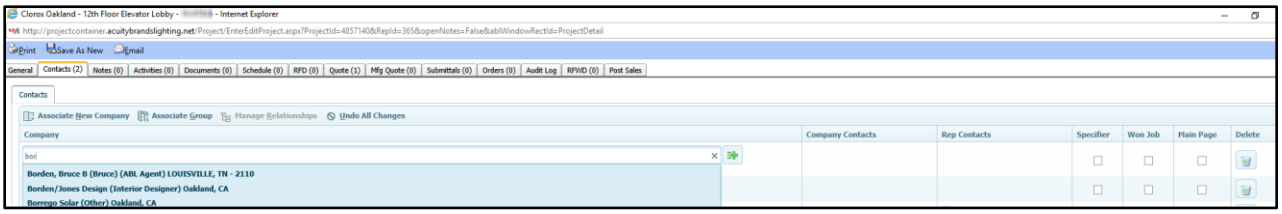
Adding and Managing Companies and Contacts

From an open Project Container or Hold Order/Order, select the Contacts tab.



To associate a company to your project, click on the Associate New Company icon or alt N. A new row will open at the top of the grid. Contacts can be added by typing in the first 3 characters of the name; a list will populate with the matching companies. Continue typing to narrow the list or at any time, arrow down and press enter to select the company of choice.

Each company is listed alphabetically by name and type. The city and state are also shown to differentiate between locations of the same company. For ABL distributors, the 6-digit customer number is also referenced.



The columns can also be made bigger or smaller by hovering over the line at the top of it to grab the line.

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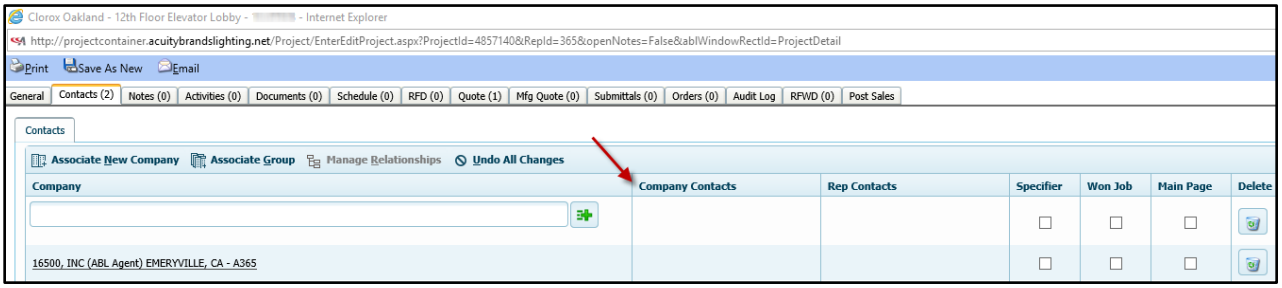
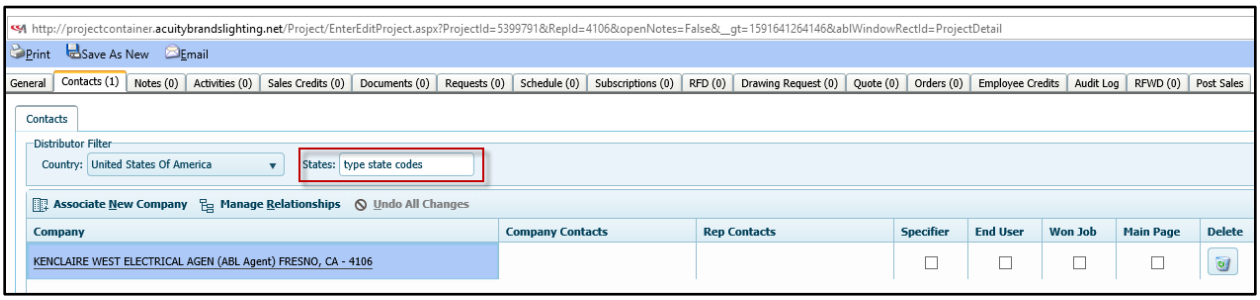
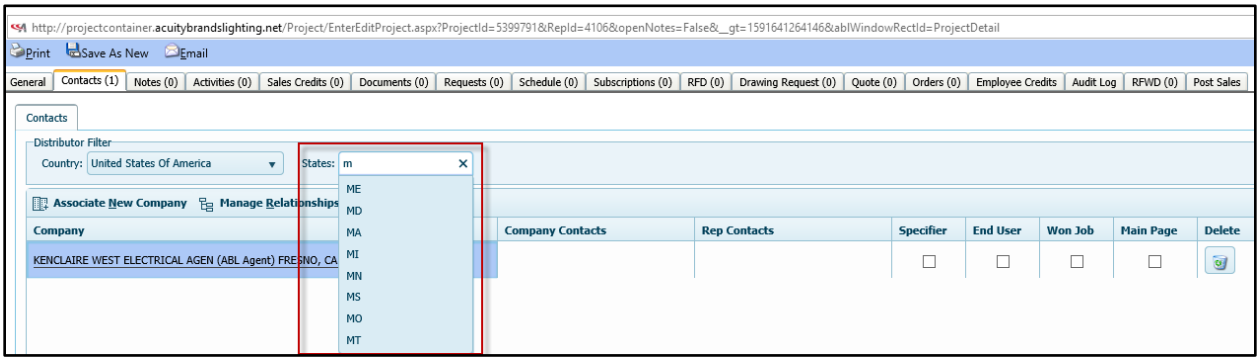
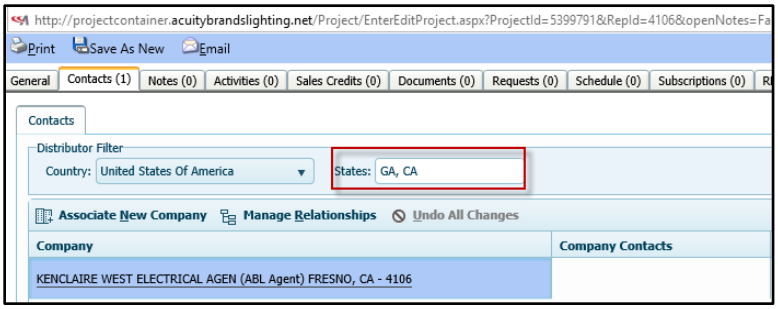


Holophane Users only

*Holophane users must narrow down their search for ABL Distributors by choosing a state or states in the **States** dialog box. Start by typing in the two-letter state abbreviation to populate the drop down to choose the correct state. Multiple states can be added by simply adding a comma and a space between state abbreviations.*







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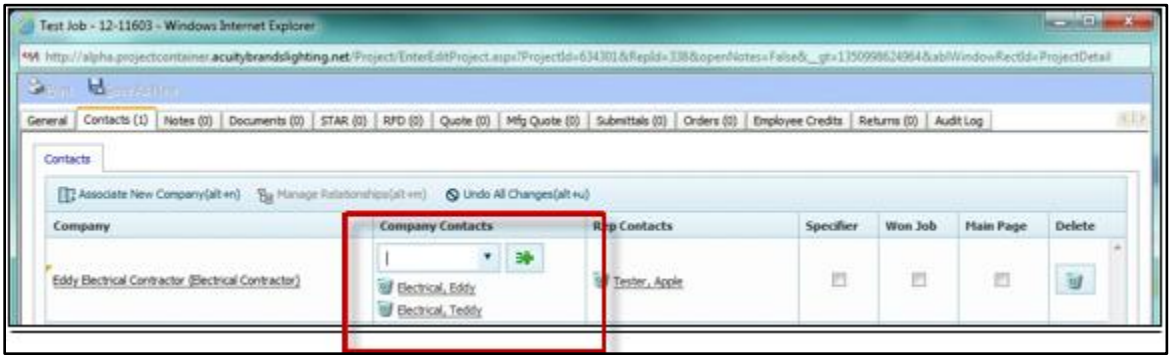
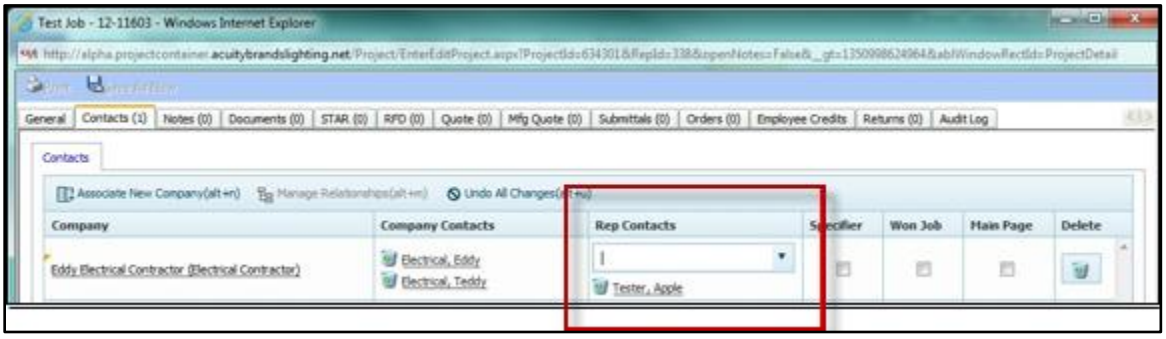
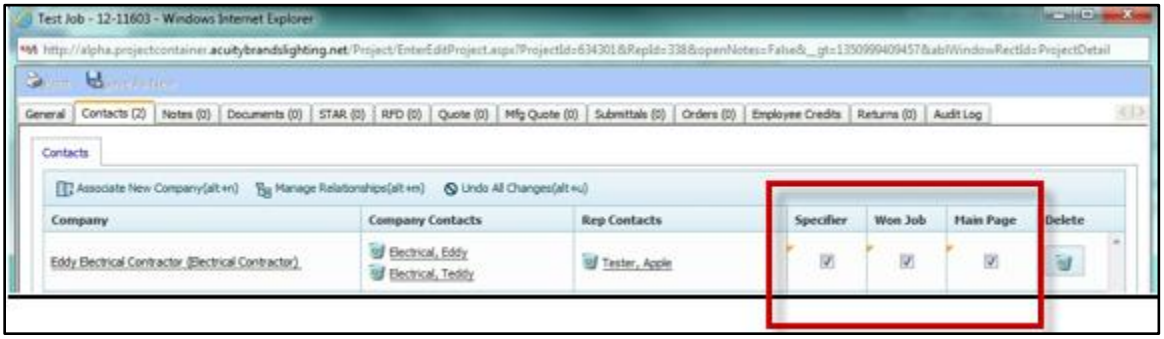
Company Contacts that are marked as Project Primary contacts will auto populate once a Company is chosen. To delete one of these contacts, simply click on the trash can next to the name to remove the contacts from the project. You can also drop the list down, or alt arrow down, to see a list of all contacts for that company. To select one, either continue typing until it auto completes, or arrow to and press enter to select a contact from the list.



Rep Contacts (or agency employees) that are setup on the company record in Contact Management will also auto populate once a Company is chosen. To remove one of these contacts, simply click on the trash can next to the name to remove the contact from the project. You can also drop the list down, or alt arrow down, to see a list of all contacts for that company. To select one, either continue typing until it auto completes, or arrow to and press enter to select a contact from the list.



To mark the company as the Specifier or Won Job either click the mouse or press the space bar while in that field to place a check mark in the box. The Main Page check box can also be checked to indicate you want the company listed on the General tab of the project.



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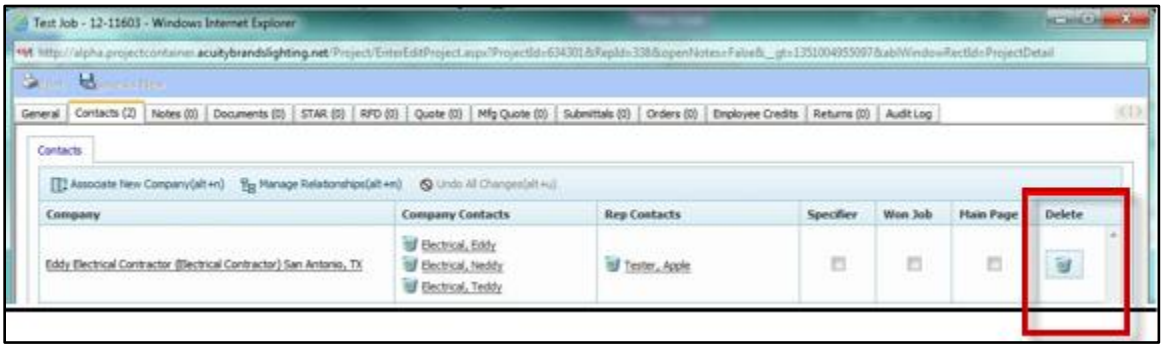
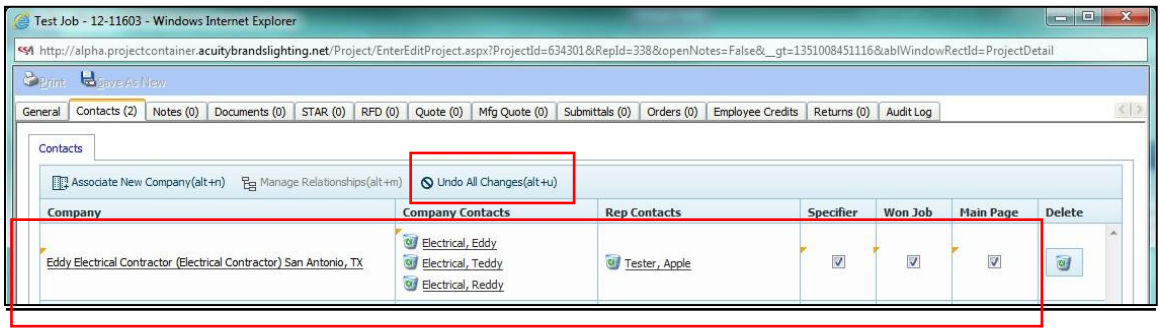
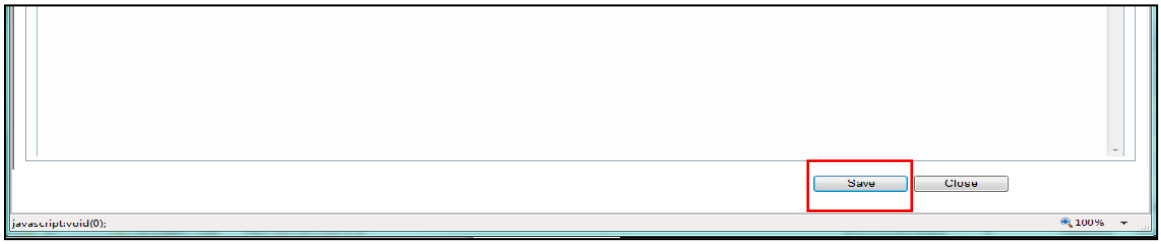
To remove an entire row from the project, simply click on the trash can at the end of the line and the contact and contact info will be removed from the project.



When you associate companies or make changes you will notice a triangle in the cells where the changes were made. If these are visible, you can undo all your changes by clicking the **Undo All Changes** button. This will roll back all your changes from the last time you saved.



When you are finished and you want to accept your changes, click Save. Clicking on another project tab will also automatically save your changes.



*Contacts entered on the project are carried over to the hold order; however, if you wish to add more companies onto the order, navigate to the order and click on the **Contacts** Tab.*
You will see the same interface to add companies and contacts to the hold order or order.

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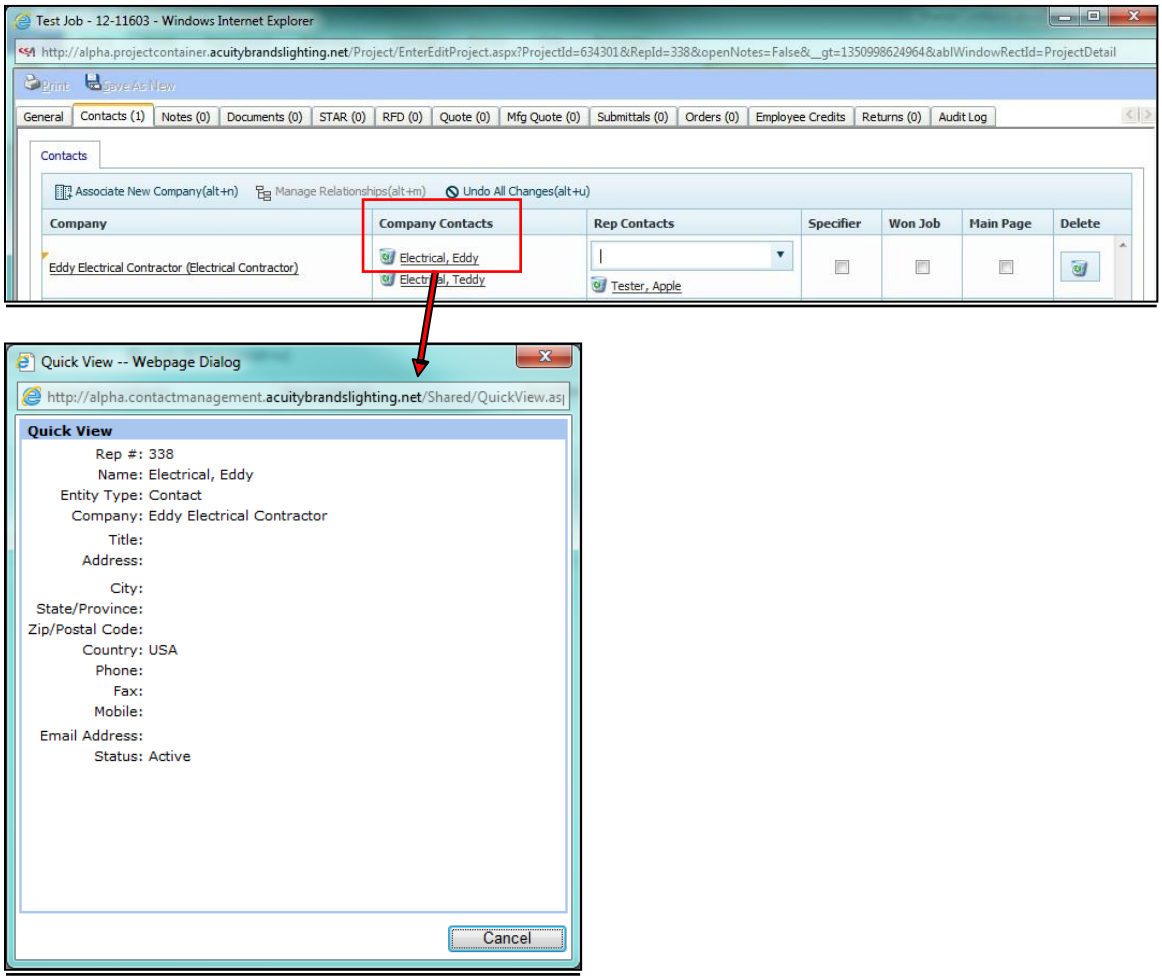
Quick View Companies and Contacts

To quick view company or contact information, simply select a company, or contact name link to invoke the **Quick View** dialog. This dialog provides an 'at a glance' view of the company or contact information stored in Contact Management. Select **Cancel** to close the dialog and return to the Project Contacts.



Select the name; the Quick View dialog is displayed.

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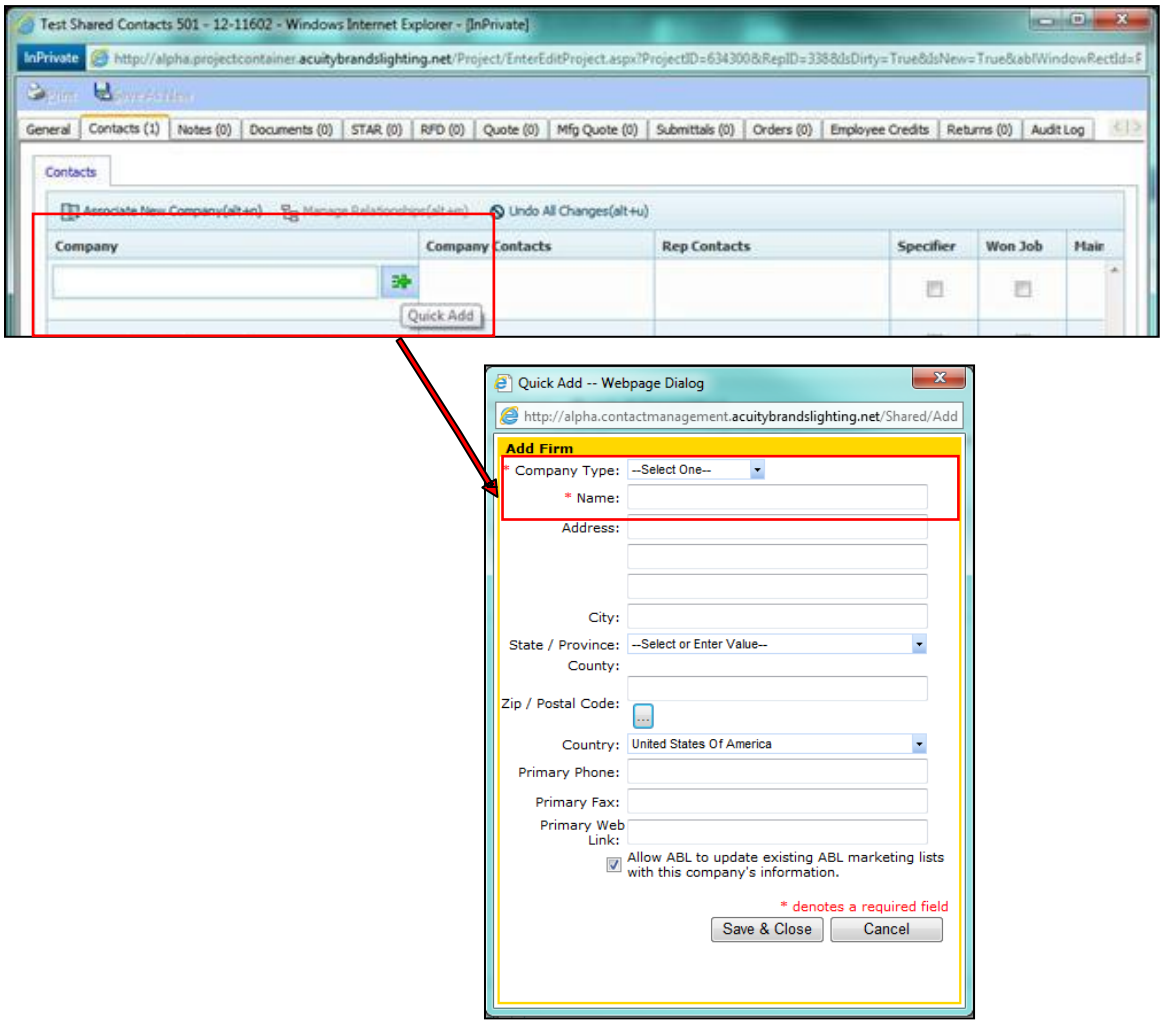
Quick Add Companies and Contacts

If a company is not listed in the Company drop down box, you can add it to Contact Management from here by clicking the plus sign to initiate a quick add dialog box.



The **Quick Add** dialog will display. Enter the new company information. **Company Type** and **Name** are required fields.

Select **Save & Close**. The contact will be automatically selected and displayed in the Company dialog box. The Company will also be added to Contact Management from the Quick Add. Quick Add is not enabled for ABL Distributor.

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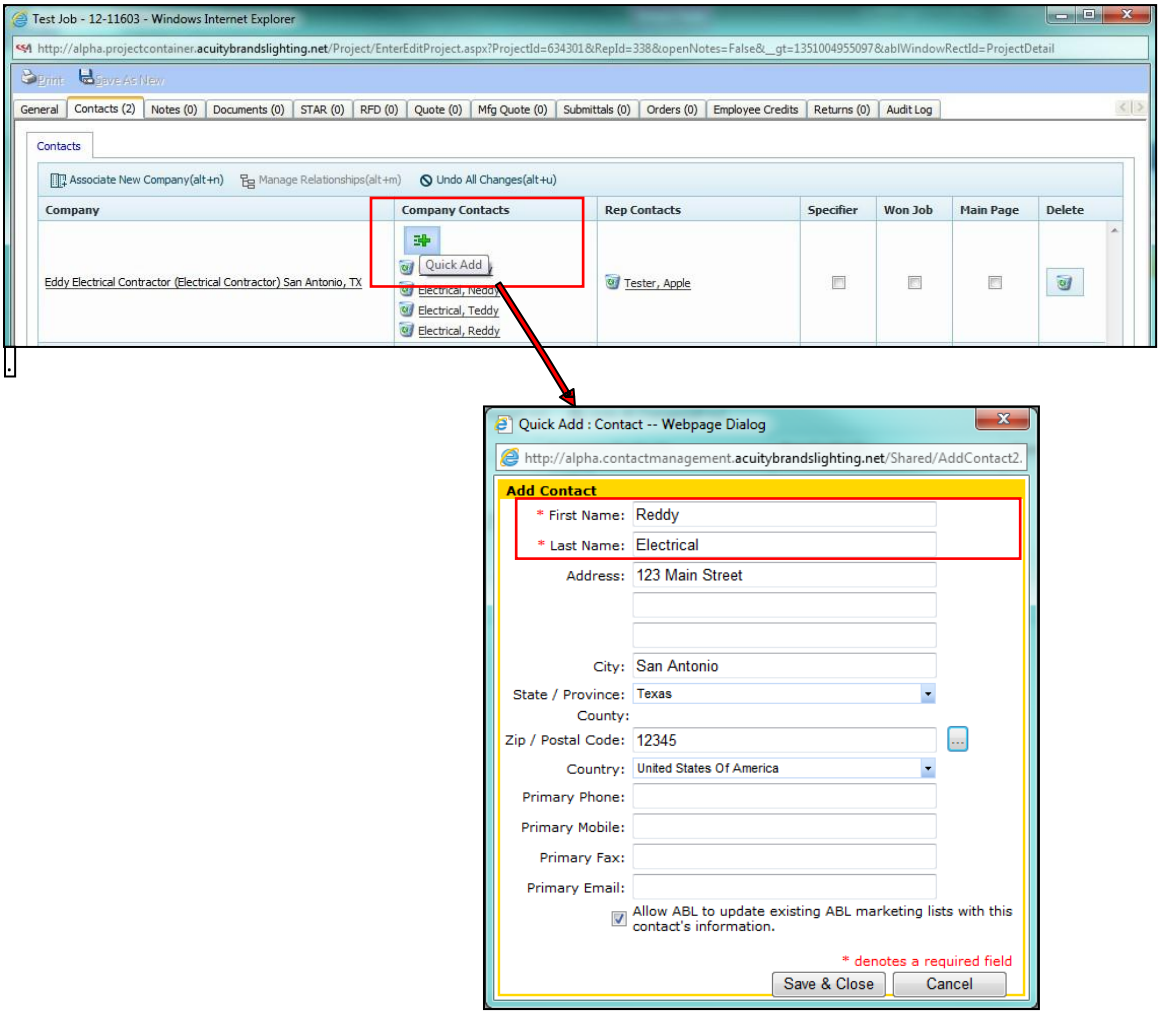
Company Contacts may also be added using the Quick Add function.

If a Contact is not listed in the Company Contacts drop down box, you can add it to Contact Management from here by clicking the plus sign to initiate a quick add dialog box.

Quick Add is not enabled for Rep Contacts.



The **Quick Add**: **Contact** dialog will display.
Enter the new contact information; first and last name are the only required fields. The address information will default based on the company information entered in Contact Management. Select **Save & Close** to save the entry and return to the **Contacts** tab. The newly added contact should be displayed.

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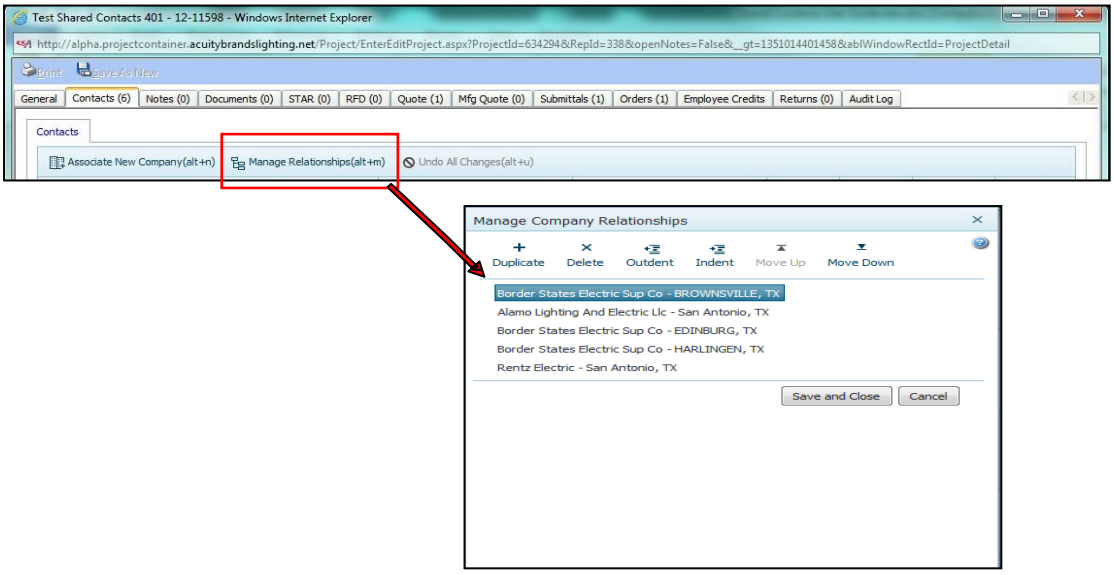
Create or Manage Relationships

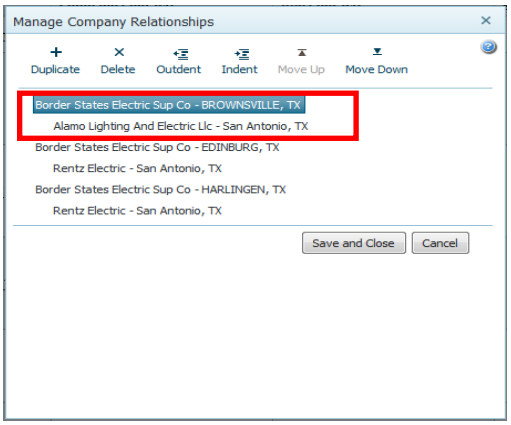
Once companies are associated to a project, an additional function can be used to manage or create relationships between distributors and contractors. The relationship of companies is used in the multi-send quote functionality.

This function is used to manage the relationship of companies on the project.

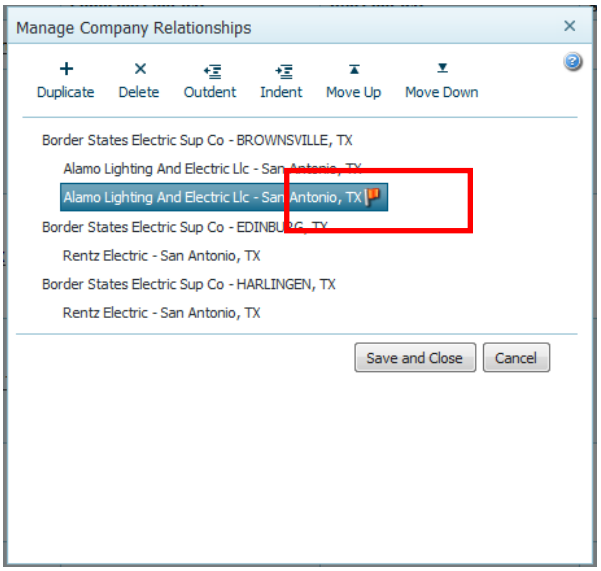
To create relationships or a hierarchy between companies, click on the Manage Relationships button. The distributor and contractor companies associated to the project will be listed.



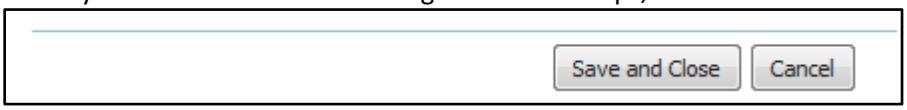
A company can be indented under another to create a parent/child relationship. You can also duplicate a company and indent it under more than one. Clicking outdent will move it back.



If you attempt to perform an action that is not valid, a warning flag will display indicating an error condition. Either remove the company or move it to create a valid relationship.



When you are finished with creating the relationships, click **Save and Close.**



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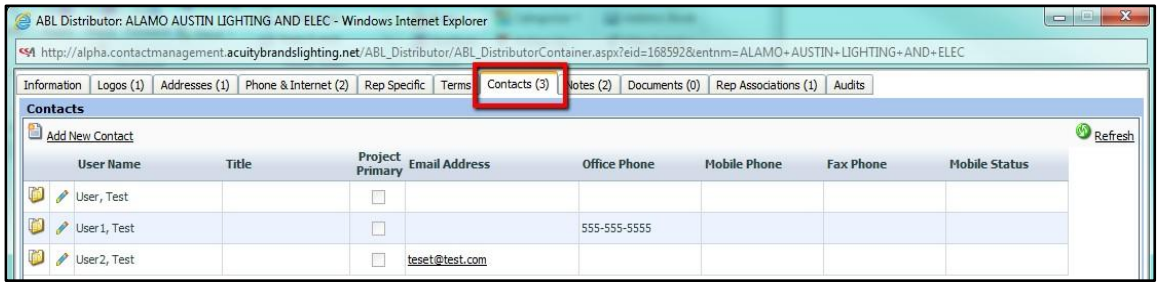
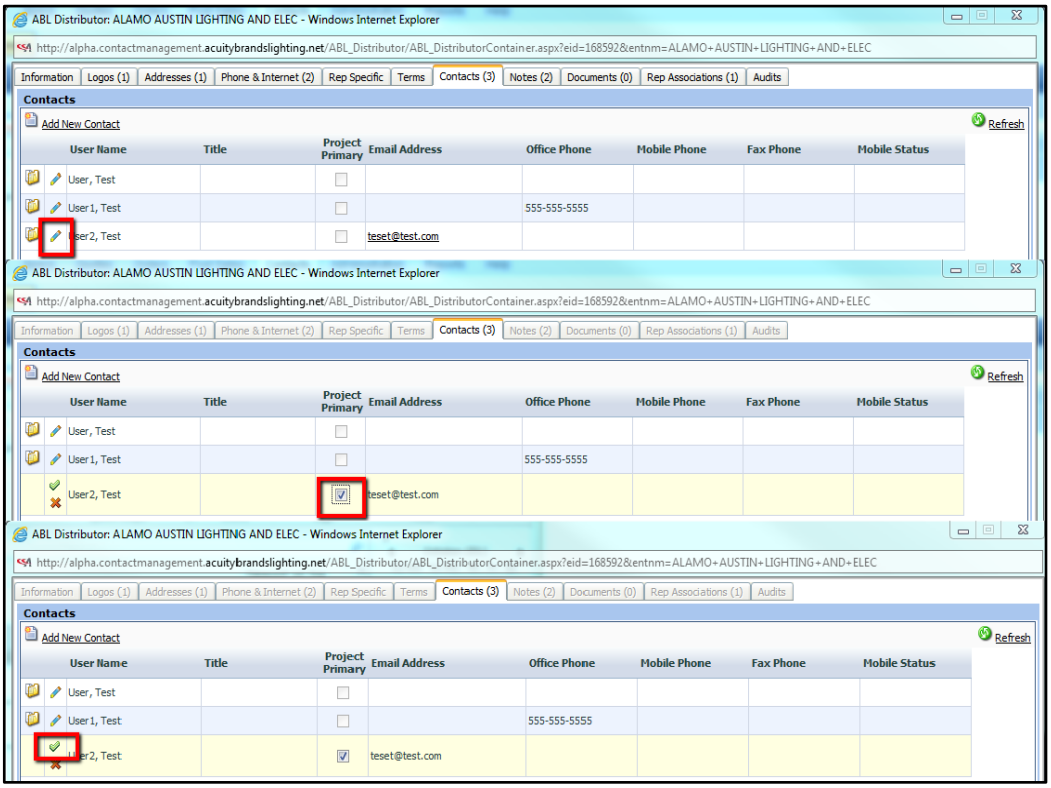
Setting Default Contacts

To set default Contacts for a Company (not Rep).

- Open the Contact Management application and select the company to set the defaults for.
- Select the **Contacts** tab.



- To set default Contacts:
  a. Click the **Edit** icon
  b. Select the **Project Primary** flag
  c. Click the **Green Check Mark**



- Repeat as needed
- Save the changes by selecting the **Save** button.