

Customer Contact List

The **Customer Contact List** contains all persons and entities that may be contacted for this Customer. Any contacts created on the Customer are available for contacting on any of the Customer's accounts.

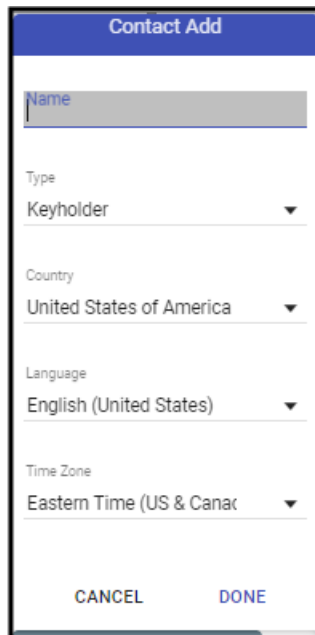
Contacts Card

The contacts card is where you add the individuals who respond to or manage the customer data.

Adding a Contact

Click the Plus sign (+) and select the type of contact to Add.

Contact Add



1. Enter the **Name** of the Contact - Be sure to enter First Name then Last Name as you would have someone read it.
2. Select the **Type** - Keyholder is the default. Keep it as a Keyholder unless specified by your organization. *Customer's may need to change this user to **Technician** to enable other external features.*
3. Verify the **Country**, **Language**, and **Time Zone**.
4. Click **Done**
5. This launches the **Advanced Edit**.

Contact Edit - Joe Contact

PROFILE CONTACT POINTS NAME & ADDRESS USER DEFINED FIELDS

Access

- ☐ Permissions Suspended
- ☐ Can Open/Close Within Schedule
- ☐ Can Open/Close Within Temp Open Window
- ☐ Can Open/Close Anytime
- ☒ Can Cancel Alarm
- ☐ Can Authorize a Schedule Change
- ☒ Can Put Entire Customer On Test
- ☐ Can Put Designated System/Areas On Test
- ☒ Can Edit Customer
- ☒ Can Give Out Customer Information

Credentials

Show All

Password: JOECONTACT

OpenVoice ID

Web Access ID

Web Profile: None

Notes

Question Answer

Availability

Valid From Valid To

CANCEL NEXT DONE

Enter any applicable data such as:

- **Contact Password**
- **Permissions** automatically load based on the data entered. You may update or change these at any time.
- **Web Access ID**
- **Notes**
- **Availability**

6. Click **Next** to enter the **Contact Points** (Phone number, email address, etc.).

Contact Add - Joe Contact

PROFILE CONTACT POINTS NAME & ADDRESS WEB MEMBERSHIP USER DEFINED FIELDS

Phone Numbers

Type	Phone Number	Extension	Script	Schedule	Private
Mobile	(123) 156-1651		Script	No Schedule	<input type="checkbox"/>

ADD

Email Address

ADD

Web

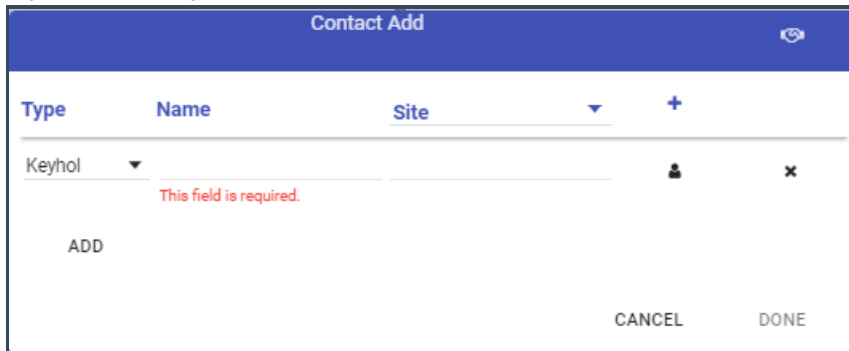
ADD

CANCEL PREVIOUS NEXT DONE

- Click **Next** to add the contact's **Name and Address**, if required.
- Click **Next** to select or enter data into any contact-specific **User-defined** fields.
- When all is entered as desired, click **Done**.
- Repeat** as required for all contacts, or use the **Contact Grid**.

Contact Grid

If you have multiple contacts to enter, Select **Contact Grid**.



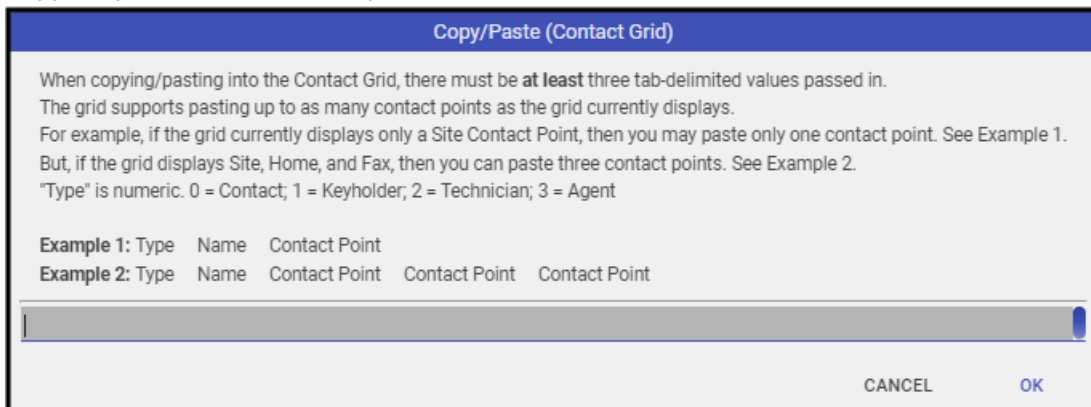
The 'Contact Add' dialog box features a blue header with the title 'Contact Add' and a handshake icon. Below the header is a table with columns: 'Type' (a dropdown menu), 'Name' (a text input field), 'Site' (a dropdown menu), and a '+' icon. The 'Type' dropdown is currently set to 'Keyhol'. Below the table, there is a red error message: 'This field is required.' Below the error message is an 'ADD' button. At the bottom right are 'CANCEL' and 'DONE' buttons.

1. Click Add

1. If available, it is possible to **import** a, properly formatted listing of contacts, using the handshake icon



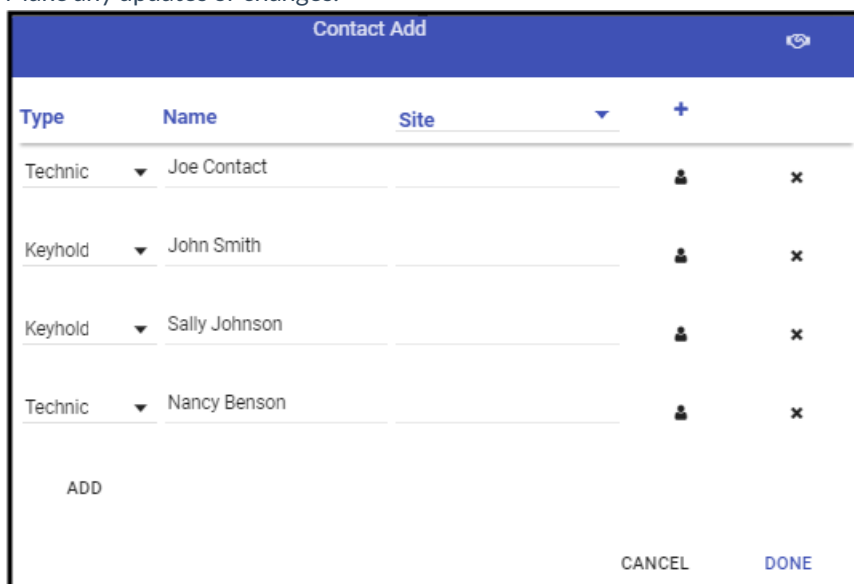
2. Copy and paste the values in the prescribed format.



The 'Copy/Paste (Contact Grid)' dialog box has a blue header with the title 'Copy/Paste (Contact Grid)'. The main content area contains instructions: 'When copying/pasting into the Contact Grid, there must be **at least** three tab-delimited values passed in. The grid supports pasting up to as many contact points as the grid currently displays. For example, if the grid currently displays only a Site Contact Point, then you may paste only one contact point. See Example 1. But, if the grid displays Site, Home, and Fax, then you can paste three contact points. See Example 2. "Type" is numeric. 0 = Contact; 1 = Keyholder; 2 = Technician; 3 = Agent'. Below the instructions are two examples: 'Example 1: Type Name Contact Point' and 'Example 2: Type Name Contact Point Contact Point Contact Point'. At the bottom right are 'CANCEL' and 'OK' buttons.

3. Click OK.

4. Make any updates or changes.



The 'Contact Add' dialog box shows a table with four rows of contact information. Each row has a 'Type' dropdown, a 'Name' text input, a 'Site' dropdown, and a '+' icon. The 'Type' dropdowns are currently set to 'Technic', 'Keyhold', 'Keyhold', and 'Technic'. The 'Name' text inputs contain 'Joe Contact', 'John Smith', 'Sally Johnson', and 'Nancy Benson'. Below the table is an 'ADD' button. At the bottom right are 'CANCEL' and 'DONE' buttons.

5. Click Done.

2. If manually adding contacts to the list:
 1. Select the **Type**, if other than Keyholder
 2. Enter the **Name** of the first contact.
 3. Select the **Contact Point Type** in the header and then enter the number. If the person(s) have multiple numbers, click the **plus sign** (?) to add more column contact type headers.
 4. Click **Add** and repeat for all contacts
3. You may click the **Advanced Edit** to enter all contact details, as noted **above**.
4. When all are entered as needed, click **Done**.

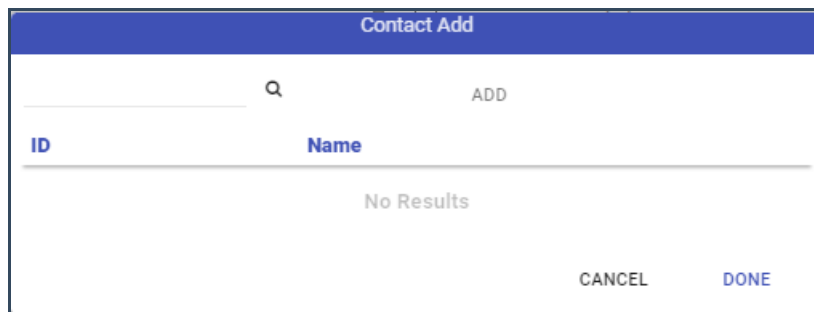
Please note: Contacts are ordered based on the order entered into the system. To change the order of who is listed, please drag and rearrange.

Deleting a Contact Person

1. Select the person to Delete
2. Locate the Trash Can (?) icon.
3. Click the Trash Can.
4. Confirm Deletion
5. Repeat as Required.
6. Save (?) the Record.

Global Keyholder

Global Keyholders are persons who are utilized on multiple accounts and reference a single Global Keyholder record for their details.



Contact Add	
<input type="text"/> Q ADD	
ID	Name
No Results	
CANCEL DONE	

1. Within the Add **Global Keyholder** dialog, enter or **search for the Global Keyholder** you wish to add.
2. Once loaded Click **Add**.
3. Once Added Click **Done**.
4. **Repeat** as required for all applicable Global Keyholders.

Customer

You may add other **Customers** that have a relationship with this Customer as well.

Contact Add

Q

ADD

ID	Name
No Results	

CANCEL

DONE

1. Select **Customer**
2. Within the **Customer** Add dialog enter or **search for the Customer** to Add.
3. Once loaded click **Add**.
4. Once Added Click **Done**.
5. **Repeat** as required for all Customer to link to this customer.

Once all contacts are entered as desired, **Save** (💾) the record.

Attention Card

The Attention card is used only when printed items require attention to a specific person.

Adding an Attention

Click the pencil icon (✎) and select the person for the type of attention.

Attentions Edit

Attention Type	Contact
Invoice	None
Mailing	None
Reporting	None
Shipping	None

CANCEL

DONE

When entered as desired, click **Done**.

Remember to click **Save** (💾) to commit the information to the database.

Contact Details Card

The Contact Details card populates with the data entered for that contact upon selection of their contact within the Contacts Card.

You may click the pencil icon (✎) to edit the contact at any time. This launches the Advanced Edit dialog for that contact as above.
