# Customer and Contact Management

## User Guide

Planview ChangePoint 2022

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# 1. Creating and Maintaining Customers

## About customers

Customers contain information about the customers, partners, suppliers and contractors that your organization works with.

*Leads* and *prospects* are customer records with a sales status of lead and prospect, respectively. For more information, see "About prospects and leads" in the *Customer Relationship Management User Guide*.

You must create a customer first before you can create contacts, opportunities, contracts, projects, and invoices to associate with that customer.

## Accessing a customer

1. Click **Customers**.

   The **Customers** list view appears.

2. Click the customer.

   The customer profile appears.

### Events that are tracked in the customer and contact history

The date, time and resource who generated the event is stored in the customer and contact history. The following events are stored in the customer and contact history:

#### Customer events

- Creation of the customer
- Editing of the customer
- Creation of a contract from the customer
- Notification that an invoice for the customer is committed
- Creation of a knowledge item from the customer
- Creation of a project from the customer
- Comments added to the customer history

### Contact events

- Creation of a contact from the customer
- Editing of a contact associated with the customer
- Invitation to use Client Portal
- Addition of comments added to the history of a contact associated with the customer

### Opportunity events

- Creation of an opportunity from the customer
- Modification to and saving of an opportunity associated with the customer
- Status change of an opportunity associated with the customer
- Change to the revised close or start date of an opportunity associated with the customer
- Change to the forecast amount of an opportunity associated with the customer
- Closure of an opportunity associated with the customer
- Creation of an contract from an opportunity associated with the customer
- Comments added to the history of an opportunity associated with the customer

## Creating a customer

The work location selected for a customer is used as the default bill-to location when the customer address is selected in the contract.

1. Click **Customers**.

   The **Customers** list view appears.

2. Click . The **Create Customer** dialog box appears.

3. Complete the fields as required. For more information, see "Create/Edit Customer dialog, General tab options" on page 7.

4. Click **Save**.

   The customer is created.

5. To continue completing the profile, see the following topics:

   - "Adding the addresses for a customer" on page 7

- "Adding the phone numbers for a customer" on page 9
- "Adding additional details for a customer" on page 9
- "Managing access to a customer" on page 11


## Create/Edit Customer dialog, General tab options

| Field | Description |
|---|---|
| **Customer name** field | Name of the customer. |
| **Alternate name** field | Name for the customer in a different language or alphabet. |
| **Account type** list | Type of account that represents the relationship between the customer and your organization. |
| **Sales status** list | Sales status of the customer.<br>The sales status identifies whether the customer is a prospect, lead, or customer. |
| **Status** list | Current status of the customer. |
| **Parent customer** type-ahead field | Parent customer, if applicable. |
| **Sales reference** check box | When enabled, indicates that the customer can be used as a reference for existing or future customers. |
| **Allow contracts** check box | When enabled, allows resources to create contracts for the customer. |

## Adding the addresses for a customer

You can specify a main address, a billing address, and a shipping address.

1. Do one of the following:
   - Create a customer.
   - Access the customer for editing.
2. Click the **Addresses** tab.

3. Complete the fields as required. For more information, see "Create/Edit Customer dialog, Addresses tab options" on page 8.

4. Click **Save**.

## Create/Edit Customer dialog, Addresses tab options

| Field | Description |
|---|---|
| **URL** field | Customer website address.<br>**Note:** The URL field does not correspond to an address type. |
| **Country** list | Name of the country. |
| **Address** fields | Street name and number, unit or suite number, and floor number. |
| **City** field | Name of the city. |
| **State/Province** type-ahead field | Name of the state or province. |
| **ZIP/Postal code** field | ZIP or postal code. |
| **Work location group** type-ahead field | Work location group for the customer. |
| **Work location** type-ahead field | Work location for the customer. |

### Adding a state or province for a customer address

You can add a missing state or province.

1. Do one of the following:
   - Create a customer.
   - Access the customer for editing.
2. Click the **Addresses** tab.
3. Click next to the **State/Province** field.

The **Create State/Province** dialog box appears.

4. In the **Abbreviation** field, enter the abbreviation for the province or state.
5. In the **State/Province** field, enter the name of the state or province.
6. Click **Save**.

## Adding the phone numbers for a customer

1. Do one of the following:
   - Create a customer.
   - Access the customer for editing.
2. Click the **Phone numbers** tab.
3. Complete the necessary fields. For more information, see "Create/Edit Customer dialog, Phone numbers tab options" on page 9.
4. Click **Save**.

## Create/Edit Customer dialog, Phone numbers tab options

| Field | Description |
|---|---|
| **Phone numbers** section and fields | Phone numbers of the customer.<br>• Main phone<br>• Toll free<br>• Fax<br>• Customer service phone<br>• Technical support phone<br>• Executive office phone<br>• Sales phone<br>• Marketing phone<br>• HR phone<br>• Security phone<br>• Other phone |

## Adding additional details for a customer

1. Do one of the following:

- Create a customer.
- Access the customer for editing.

2. Click the **Details** tab.
3. Complete the fields as required. For more information, see "Create/Edit Customer dialog, Details tab options" on page 10.
4. Click **Save**.

## Create/Edit Customer dialog, Details tab options

| Field | Description |
|---|---|
| **Source** list | Source associated with the customer, if applicable.<br>If the source is not in the list, you can create a new source. |
| **Account manager** type-ahead field | Person who is managing the customer account. |
| **Telemarketer** type-ahead field | Telemarketer assigned to the customer, if the customer's sales status is **Prospect**. |
| **Sales representative** type-ahead field | Resource who is managing the sales cycle for this customer, if the customer's sales status is **Lead**. |
| **Customer ID** field | A unique number to track the customer.<br>If auto-numbering is set up by your organization, an ID is automatically assigned. |
| **Sales region** list | Region or territory where the customer is located. |
| **Industry type** list | The customer's type of industry. |
| **Annual revenue** list | Estimated annual revenue of the customer. |
| **Employees** list | Estimated number of employees in the customer. |
| **Tax exemption** check box | Select if the customer has tax exempt status. |

| Field | Description |
|---|---|
| **Tax exemption ID** field | Tax exemption ID.<br>Use if the customer has tax exempt status. |
| **VAT registration number** field | Value-added tax registration number. |
| **Notes** field | Notes about the customer. |
| **Enabled for surveys** check box | When enabled, includes the customer in surveys.<br>For more information, see the *Survey Management User Guide*. |
| **Calculate the report card** check box | When enabled, generates a report card for the customer.<br>For more information, see the *Survey Management User Guide*. |

## Managing access to a customer

You can restrict access to a customer to individual resources, or to the resources who have access to specific billing offices. When more than one billing office is specified, resources with access to at least one of the billing offices can access the customer.

If you restrict access to a customer, then access to the contacts, contracts, and projects of the customer are also restricted.

1. Do one of the following:
   - Create a customer.
   - Access the customer for editing.
2. Click the **Access** tab.
3. To restrict access to individual resources:
   a. Select the **Restrict access to the following resources** check box.
   b. In the **Preferred resources** list, select the resources.
   c. Click the up arrow.

4. To remove access from individual resources (applies only when the **Restrict access to the following resources** check box is selected):
   a. In the **Restrict access to the following resources** list, select the resources.
   b. Click the down arrow.
5. To restrict access to the resources who have access to specific billing offices, in the **Billing office** type-ahead field, select one or more billing offices.
6. To select additional resources and optionally add them to your preferred resources list, click **Manage Resources**.
7. Click **Save**.

## Editing a customer

1. Click **Customers**. The **Customers** list view appears.
2. Click the customer.
3. Click ⋮ > **Edit**. The **Edit Customer** dialog box appears.
4. Make the necessary changes and then click **Save**.

### To delete the customer

1. Click **Delete**.
2. Click **OK** to confirm.

# 2. Creating and Maintaining Contacts

## About contacts

Contacts are the people who work for the customers that your organization does business with. Contact profiles contain information such as the contacts' job title, department, address, phone numbers, and so on.

You can create contacts for the customers that you have access to. At least one contact must be created for a customer before a contract can be created for that customer.

## Accessing a contact

You access contacts from the related customer profile.

**Tip:** You can also do a global search for a contact.

1. Access the customer profile.
2. In the **Contacts** card, click the contact.

   The contact profile appears.

### Adding and removing contacts in your My Contacts list

If you remove the only contact for a specific customer, the customer is also removed from your **My Contacts** list.

1. Access the contact.
2. To add the contact, click **Actions** > **Add to My Contacts**.
3. To remove the contact, click **Actions** > **Remove from My Contacts**.

## Creating a contact

To properly format the contact's name, specify the contact's full name in the **Enter Full Name** dialog box, rather than enter the name directly in the name field.

1. Access the customer profile.
2. Click > **Contact**. The **Create Contact** dialog box appears.
3. To enter the contact's name, do the following:
   a. Click the **Full name** button.

The **Enter Full Name** dialog box appears.

b. Complete the fields as required. For more information, see "Enter Full Name dialog box options" on page 14.

4. On the **General** tab, complete the fields as required. For more information, see "Create/Edit Contact dialog, General tab options" on page 15.
5. In the **Customer** type-ahead field, select the customer to which the contact belongs.
6. Click **Save**.

   The contact is created.

7. To continue completing the contact profile, see the following topics:
   - "Adding the addresses for a contact" on page 15
   - "Adding the phone numbers for a contact" on page 17
   - "Adding additional details for a contact" on page 18
   - "Setting up Client Portal access for a contact" on page 19
   - "Managing access to a contact" on page 22

## Enter Full Name dialog box options

| Field | Description |
|---|---|
| **Title** field | Contact's courtesy title (for example, Ms., Mr., Dr.). |
| **First**, **Middle**, **Last** fields | Contact's names. |
| **Suffix** field | Contact's name suffix (for example, Jr., Sr., III), or educational or professional designations (for example, MBA, Ph.D). |

## Create/Edit Contact dialog, General tab options

| Field | Description |
|---|---|
| **Full Name** button | Opens the **Enter Full Name** dialog box.<br>For more information, see "Enter Full Name dialog box options" on page 14. |
| **Full Name** field | Do not enter a name directly in the **Full name** field of the **Contact** dialog. Instead, click the **Full Name** button. |
| **Job title** field | Contact's job title. |
| **Customer** type-ahead field | Customer with which the contact is associated. |
| **Type** list | Type of contact. |
| **Email 1**, **Email 2**, **Email 3** fields | Contact's email address. The **Email 1** address is required:<br>• To give the contact access to Client Portal.<br>• If the contact's organization is enabled for surveys. |
| **Sales reference** check box | When selected, indicates that the contact has agreed to be a sales reference on behalf of their organization.<br>For this option to be available, the **Sales reference** check box must be selected on the associated customer. |
| **Add to my contacts** check box | When selected, adds the contact to your **My Contacts** list. |

## Adding the addresses for a contact

You can specify a main address, a billingaddresse and a shipping address.

1. Do one of the following:
   - Create a contact.
   - Access the contact for editing.
2. Click the **Addresses** tab.

3. Complete the fields as required. For more information, see "Create/Edit Contact dialog, Addresses tab options" on page 16.
4. Click **Save**.

## Create/Edit Contact dialog, Addresses tab options

| Field | Description |
|---|---|
| **URL** field | A URL associated with the contact's customer.<br>**Note:** The URL field does not belong to any address type. |
| **Country** list | Name of the country. |
| **Address** fields | Street name and number, unit or suite number, and floor number. |
| **City** field | Name of the city. |
| **State/Province** type-ahead field | Name of the state or province. |
| **ZIP/Postal code** field | ZIP or postal code. |
| **Work location group** type-ahead field | Work location group for the contact. |
| **Work location** type-ahead field | Work location for the contact. |

### Adding a state or province for a contact address

You can add a missing state or province.

1. Do one of the following:
   - Create a contact.
   - Access the contact for editing.
2. Click the **Addresses** tab.
3. If you have not already done so, in the **Country** list, select a country.

4. Click next to the **State/Province** field to add the province or state.

   The **Create State/Province** dialog box appears.

5. In the **Abbreviation** field, enter the abbreviation for the state or province.
6. In the **State/Province** field, enter the name of the state or province.
7. Click **Save**.

## Adding the phone numbers for a contact

1. Do one of the following:
   - Create a contact.
   - Access the contact for editing.
2. Click the **Phone numbers** tab.
3. Complete the fields as required. For more information, see "Create/Edit Contact dialog, Phone numbers tab options" on page 18.
4. Click **Save**.

## Create/Edit Contact dialog, Phone numbers tab options

| Field | Description |
|---|---|
| **Phone numbers** section and fields | Phone numbers of the contact:<br>• Business phone<br>• Mobile<br>• Home phone<br>• Main contact<br>• Other phone<br>• Pager<br>• Business fax<br>• Business phone 2<br>• Home phone 2<br>• Home fax<br>• Manager phone<br>• Assistant phone<br>• Other fax<br>• Car phone |

## Adding additional details for a contact

1. Do one of the following:
   - Create a contact.
   - Access the contact for editing.
2. Click the **Details** tab.
3. Complete the necessary fields. For more information, see "Create/Edit Contact dialog, Details tab options" on page 19.
4. Click **Save**.

### Create/Edit Contact dialog, Details tab options

| Field | Description |
|---|---|
| **Department** field | Contact's business department. |
| **Manager** field | Contact's manager. |
| **Office** field | Office where the contact works. |
| **Assistant name** field | Contact's assistant. |
| **Profession** field | Contact's occupation. |
| **Nickname** field | Name by which the contact prefers to be addressed. |
| **Birthday** date field | Date of the contact's birthday. |
| **Spouse name** field | Contact's spouse. |
| **Anniversary** date field | Date of the contact's anniversary, or any other special date you want to remember. |
| **Comments** field | Comments or notes regarding the contact. |

## About Client Portal access

Client Portal is an application that allows contacts to access a subset of ChangePoint functionality. To access Client Portal, a contact must be *sponsored* by a ChangePoint resource. The sponsor sets up the access rights and specifies the sections of ChangePoint that the contact is allowed to access.

Once the access is set up for a contact, only the sponsor can edit the Client Portal access. Other resources can only view the information.

### Setting up Client Portal access for a contact

1. Do one of the following:
   - Create a contact.
   - Access the contact for editing.
2. Click the **Client Portal** tab.

3. Complete the necessary fields. For more information, see "Create/Edit Contact dialog, Client Portal tab options" on page 20.
4. Click **Save**.

## Create/Edit Contact dialog, Client Portal tab options

| Field | Description |
|---|---|
| **Enable Client Portal access** checkbox | When selected, the contact can access Client Portal features according to the settings on this tab. |
| **Expiry date** field | The date after which the contact's access expires. Access ends earlier than the expiry date if the contact does not sign in to Client Portal within the period of time set by the ChangePoint administrator.<br>**Note:** If the contact's access expires due to non-use, then only the administrator can reactivate it. |
| **Reset Password** button | Resets the Client Portal password and sends the contact an email with the new sign-in information. |
| **Send Reminder** button | Sends the contact an email with sign-in information. |
| **Team folders** check box | When selected, the contact can access team folders that they are members of. |
| **Project review** check box | When selected, the contact can review the projects related to their organization that have been enabled for Client Portal access. |
| **Invoice review** check box | When selected, the contact can view invoices related to their organization, except for invoices that are in draft status. |
| **Online support** check box | When selected, the contact can create requests, view requests for their organization, and view the knowledge base. |
| **Close request anytime** check box | When selected, the contact can close a request at anytime. When cleared, the contact can close the request only when the request workflow allows a transition to closed status. |

| Field | Description |
|---|---|
| **Workflow participant** | When selected, the contact can be assigned to a step in a workflow. |
| **Access Resource profiles** | When selected, the contact can access ChangePoint resource profiles. |
| **Access all resource profiles** check box | When selected, the contact can access all resource profiles. Available only when the **Access resource profiles** check box is selected. |
| **Resource** list | List of resources that the contact can access. |
| **Add/Remove** button | Opens the **Manage Access to Resource Profiles** dialog box. Available only when the **Access all resource profiles** check box is cleared. |
| **Maximum number of resources** field | Maximum number of resources that the contact can access. |
| **Available number of resources** field | Remaining number of resources that the contact can access before the maximum is reached. |
| **Sponsor** field | Resource who granted the Client Portal access to the contact. |
| **Date activated** date field | Date that the Client Portal access was granted. |
| **Last access** date field | Date that the contact last accessed the Client Portal. |
| **Status** field | Current Client Portal access status for the contact: **Pending approval**, **Approval rejected**, **Active** or **Expired**. |

## Setting up access to resource profiles for a Client Portal user

You can specify the list of resource profiles that the Client Portal user can access.

1. Do one of the following:
   - Create a contact.
   - Access the contact for editing.
2. Click the **Client Portal** tab.

3. Select the **Enable Client Portal access** check box.
4. Click **Add/Remove**.

   The **Manage Access to Resource Profiles** dialog box appears.
5. Do one of the following:
   - To add resources, select the resources in the **Preferred resources** list, and then click **Add**.
   - To remove resources, select the resources in the **Selected resources** list, and them click **Remove**.
6. Click **OK**.

## Managing access to a contact

By default, all resources who have access to a customer can view and edit the contacts for the customer. However, you can restrict access to specific resources only.

1. Do one of the following:
   - Create a contact.
   - Access the contact for editing.
2. Click the **Access** tab.
3. To restrict access to specific resources:
   a. Select the **Restrict access to the following resources** check box.
   b. In the **Preferred resources** list, select one or more resources.
   c. Click the up arrow that is above the **Preferred resources** list.
4. To remove access from specific resources:
   a. Select the **Restrict access to the following resources** check box.
   b. In the **Restrict access to the following resources** list, select one or more resources.
   c. Click the down arrow that is above the **Preferred resources** list.
5. To select additional resources and optionally add them to your preferred resources, click **Manage Resources**.

6. Click **Save**.

## Editing a contact

1. Access the contact for editing.

   The **Edit Contact** dialog box appears.

2. Make the necessary changes.

3. Click **Save**.

### Deleting a contact

1. Access the contact for editing.

   The **Edit Contact** dialog box appears.

2. Click **Delete**.

3. Click **OK** to confirm.

## Sending an email from a contact profile

If an **Email 1** email address is specified for the contact, you can create and send an email message from the contact profile or from the **Edit Contact** dialog box.

1. Access the contact.

2. Do one of the following:

   - Click **Actions** > **Create** > **Email**.

   - On the **General** tab, click the contact's **Email 1** email address.

   Your email application opens a new message with the contact's email address in the **To** field.

3. Complete and send the email.

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