Customer and Contact Management

User Guide

Changepoint SA 2021

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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

The sales status identifies whether the customer is a prospect, lead, or customer, and therefore whether it is displayed in the **Leads** tree view, **Prospects** tree view or **Customers** tree view.

1. Click **Customer** > **Profiles**

   The **Customers** tree view appears, displayed by account type.

2. To display the customers by sales region, click **Options** > **View** > **Sales region**.

   Note: Only the customers that have a sales region specified on their profiles display in this view.

3. Expand the tree view to locate the customer.

4. Click the customer.

   The customer profile appears.

Activities and events that are tracked in the customer and contact history

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

Customer activities and 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 activity or completion of activity created from the customer
- Creation of a knowledge item from the customer
- Creation of a project from the customer
- Comments added to the customer history

Contact activities and events

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

Opportunity activities and 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 activity or completion of activity created from 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 **My Tools** > **New** and then click **Customer** from the list.

The **Create Customer** dialog box displays the **General** tab.

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

   The customer is created.
4. To continue completing the profile, see the following topics:
   - "Adding the addresses for a customer" on page 8
   - "Adding the phone numbers for a customer" on page 9
   - "Adding additional details for a customer" on page 10
   - "Managing access to a customer" on page 12

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. The sales status identifies whether the customer is a prospect, lead, or customer, and therefore whether it is displayed in the **Leads** tree view, **Prospects** tree view or **Customers** tree view.
Status list	Current status of the customer.
Parent customer type-ahead field	Parent customer, if applicable.

Field	Description
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. **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.

Field	Description
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 10.
4. Click **Save**.

Create/Edit Customer dialog, Phone numbers tab options

Field	Description
Phone numbers section and fields	Phone numbers of the customer. • Main phone • Toll free • Fax • Customer service phone • Technical support phone • Executive office phone • Sales phone • Marketing phone • HR phone • Security phone • 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

The **Telemarketer** field is required when the sales status is **Prospect**. This field is used to sort the **Prospects** tree view list by telemarketer name.

The **Sales representative** field is required when the sales status is **Lead**. This field is used to sort the **Leads** tree view by sales representative name.

Field	Description
Source list	Source associated with the customer, if applicable. 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. 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. A value is required in this field in order for the customer to be available when the **Sales Region** option in the **Customers** tree view is selected.
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.
Tax exemption ID field	Tax exemption ID. Use if the customer has tax exempt status.
VAT registration number field	Value-added tax registration number.
Notes field	Notes about the customer.

Field	Description
Enabled for surveys check box	When enabled, includes the customer in surveys. For more information, see the *Survey Management User Guide*.
Calculate the report card check box	When enabled, generates a report card for the customer. 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. Access the customer for editing.

   The **Edit Customer** dialog box appears.
2. Make the necessary changes.
3. Click **Save**.

Deleting a customer

1. Access the customer for editing.

   The **Edit Customer** dialog box appears.
2. Click **Delete**.
3. 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 through the **Customers** tree view.

1. Click **Customer** > **Profiles**.

   The **Customers** tree view appears.

2. Do one of the following:

   - To display the customers by account type, click **Options** > **View** > **Account type**. Expand the tree view to locate the customer.
   - To display the customers by sales region, click **Options** > **View** > **Sales region**. Expand the tree view to locate the customer.

   Note: Only the customers that have a sales region specified on their profiles appear in this view.

   - To search for the contact by name, use the **Filter** option.

3. Expand the customer to locate the contact.
4. 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. Click Click **My Tools** > **New** and then click Contact from the list.

   The **Create Contact** dialog box appears displays the **General** tab.

2. 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 17.

3. On the **General** tab, complete the fields as required. For more information, see "Create/Edit Contact dialog, General tab options" on page 17.

4. In the **Customer** type-ahead field, select the customer to which the contact belongs.

5. Click **Save**.

   The contact is created.

6. To continue completing the contact profile, see the following topics:

   - "Adding the addresses for a contact" on page 18
   - "Adding the phone numbers for a contact" on page 19
   - "Adding additional details for a contact" on page 20
   - "Setting up Client Portal access for a contact" on page 21
   - "Managing access to a contact" on page 24

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. For more information, see "Enter Full Name dialog box options" on page 17.
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: • To give the contact access to Client Portal. • 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. 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 18.
4. Click **Save**.

Create/Edit Contact dialog, Addresses tab options

Field	Description
URL field	A URL associated with the contact's customer. **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 20.
4. Click **Save**.

Create/Edit Contact dialog, Phone numbers tab options

Field	Description
Phone numbers section and fields	Phone numbers of the contact: • Business phone • Mobile • Home phone • Main contact • Other phone • Pager • Business fax • Business phone 2 • Home phone 2 • Home fax • Manager phone • Assistant phone • Other fax • 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 21.
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 22.
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. **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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