

Working with Contacts

Describes in details the types of the Smart Flow contacts, how to create or delete contacts, and how to synchronize contacts between Smart Flow and MS-Outlook

Table of Contents

Introduction.....	2
Working with the Contacts.....	2
Types of Contacts.....	2
The Contacts Screen.....	3
Creation of a New Contact.....	4
Adding a Contact Representing a Company or Organization.....	4
Adding an Individual Contact belonging to a Company or Organization.....	5
Adding an Individual Contact not belonging to a Company or Organization.....	5
Deleting a Contact.....	6
Synchronizing with MS-Outlook Contacts.....	7
Importing Contacts from MS-Outlook.....	7
Exporting Contacts to MS-Outlook.....	7

Introduction

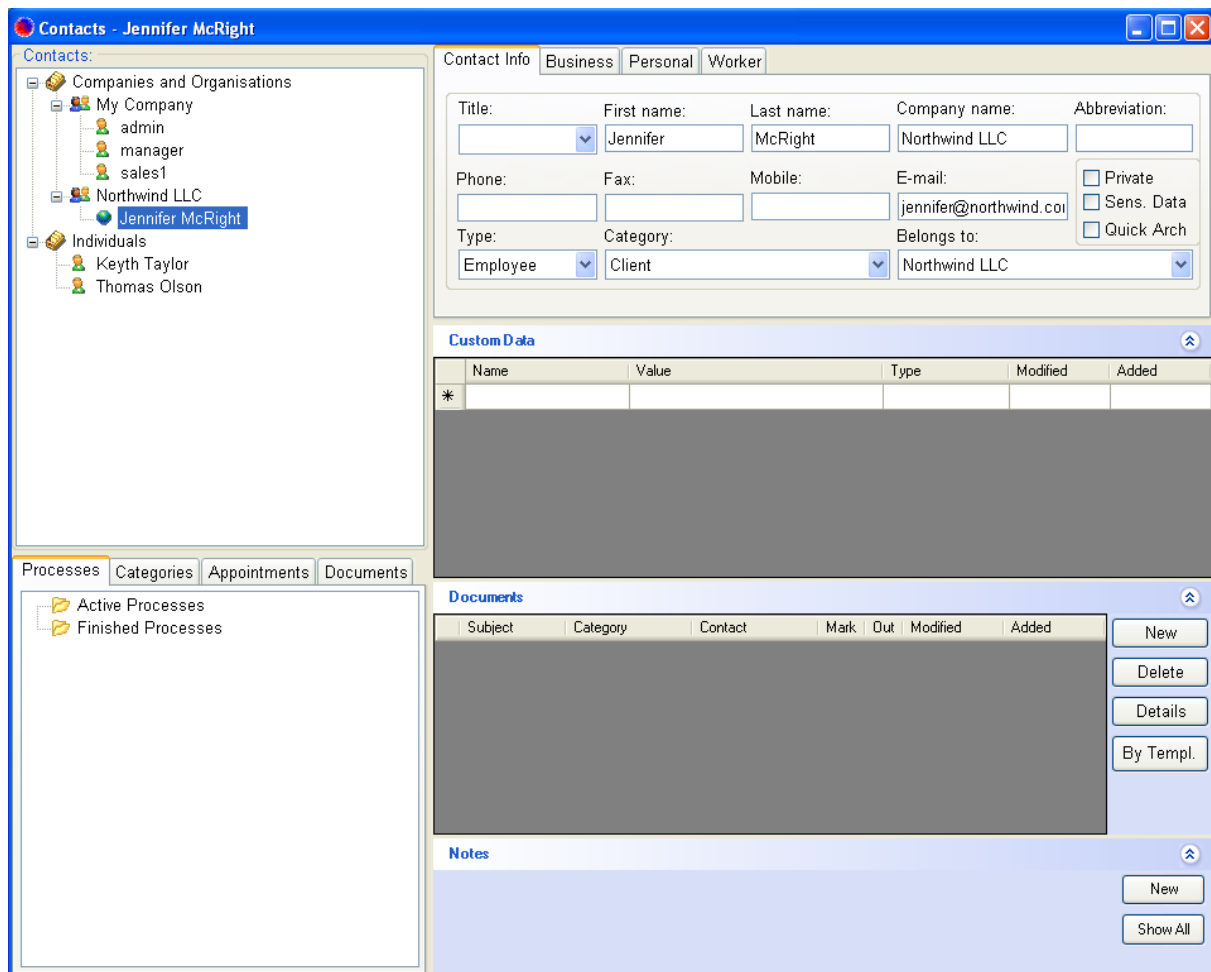
There are generally three types of contacts available in *Smart Flow*. The contact types are explained in details below. We could also classify the *Smart Flow* contacts into other two branches –contacts of the workers (usually related to the users), and normal contacts (e.g. clients, suppliers, etc.).

The worker-contacts are the people, which could be assigned as responsible persons to the work processes, or as participants to the meetings and appointments. The normal contacts are the people (individuals), companies or organizations your own organization works with. These contacts could be related later to various categories, work processes or appointments.

Keep in mind that when you create new users, *Smart Flow* automatically creates their corresponding worker-contacts and relates the new users to these contacts.

Working with the Contacts

To manage the available or to create new contacts, on the *Smart Flow* main screen select the menu *Manage / Contacts*, or press the button 'Contacts' on the toolbar. The screen *Contacts* will show up.



Types of Contacts

There are generally three kinds of contacts available in *Smart Flow*:

- *Company or Organization* – this is a contact that represents a company or organization. This kind of contact does not have a first or a last name, but only a company name. The field *Belongs to* can be either empty or not. If this field is not empty the contact could represent a subsidiary company. The contacts of this type appear under the *Companies and Organizations* branch in the tree of the available contacts.
- *Individual Contact Belonging to a Company or Organization* - this is a contact that represents a person working for company or organization. This kind of contact should have a first or a last name, and also a company (organizational) name. The more important is that the field *Belongs to* should be used to relate this contact to an organizational contact. The organizational contact should represent the company or organization, to which this contact belongs. The contacts of this type appear under the corresponding organizational contacts in the tree of the available contacts.
- *Individual Contact* - this is a contact that represents a person, which could either work or not for a company or organization. This kind of contact should have a first or a last name, and optionally a company (organizational) name. The more important is that the field *Belongs to* for this kind of contact should be empty. The usually cases are when the contact has no or unknown company, or when there is no need to create an additional contact to represent its parent company or organization. The contacts of this type appear under the *Individuals* branch in the tree of the available contacts.

The Contacts Screen

On the upper left side of the screen are displayed the available contacts, grouped into two main branches – *Companies and Organizations*, and *Individuals*. Under the *Companies and Organizations* branch are displayed the contacts representing the companies and organizations along with the individuals (persons) belonging to them. Under the *Individuals* branch are displayed the contacts representing the individuals (persons), which do not belong to any organizational contact. Nevertheless, these contacts could also have a company name specified.

On the upper right side of the screen are displayed the details of the currently selected contact – its names, the company name (if any), the abbreviation of the contact's names, the available phone and fax numbers, e-mail addresses and the other available business or personal data. The contact's details are grouped into several tabs – *Contact Info*, *Business*, *Personal* and *Worker*.

Pay special attention to the tab *Worker*. It is possible to assign each contact as a worker to various work processes, or as a participant to meetings or appointments. To be able to do this, you need to mark the groups on tab *Worker*, to which the contact should belong as a worker. **Do mind that when you create new users, Smart Flow creates automatically worker-contacts for them, and assigns these contacts to the same groups as the groups, to which the new users belong.**

The screenshot shows a 'Contact Info' form with tabs for 'Business', 'Personal', and 'Worker'. The 'Business' tab is selected. The form contains the following fields and options:

- Title: [Dropdown]
- First name: [Text]
- Last name: [Text]
- Company name: [Text] (My Company)
- Abbreviation: [Text]
- Phone: [Text]
- Fax: [Text]
- Mobile: [Text]
- E-mail: [Text]
- Type: [Dropdown] (Company)
- Category: [Dropdown] (Own Organization)
- Belongs to: [Dropdown]
- Private:
- Sens. Data:
- Quick Arch:

Pay also attention to the fields *Type* and *Category*. The field *Type* is used to set the specific type of the currently selected contact – whether it is a company, organization, employee, manager, etc. The field *Category* is used to show the relation between the currently selected contact and your own organization – whether it is a client, supplier, partner, etc. Both lists of options (for *Type* and *Category*) could be customized by the *Smart Flow* administrator.

On the lower right side of the screen are shown the panels of the custom data, documents and notes, related to the currently selected contact. You can use these panels to specify additional data or information concerning the currently selected contact.

On the lower left side of the screen are displayed the objects, related to the currently selected contact - work processes, categories, appointments or documents. This makes it easy to find out all objects, to which the currently selected contact is related at the moment.

Creation of a New Contact

Adding a Contact Representing a Company or Organization

To add a contact, representing a company or organization, right click on the tree of the available contacts and select *New Contact* from the context menu. The *New Contact* dialog will show up.

The screenshot shows the 'New Contact' dialog box with the following fields and options:

- Title: [Dropdown]
- First name: [Text]
- Last name: [Text]
- Company name: [Text] (Northwind LLC)
- Abbreviation: [Text]
- Phone: [Text]
- Fax: [Text]
- Mobile: [Text]
- E-mail: [Text]
- Type: [Dropdown] (Company)
- Category: [Dropdown] (Client)
- Belongs to: [Dropdown]
- Private:
- Sens. Data:
- Quick Arch:

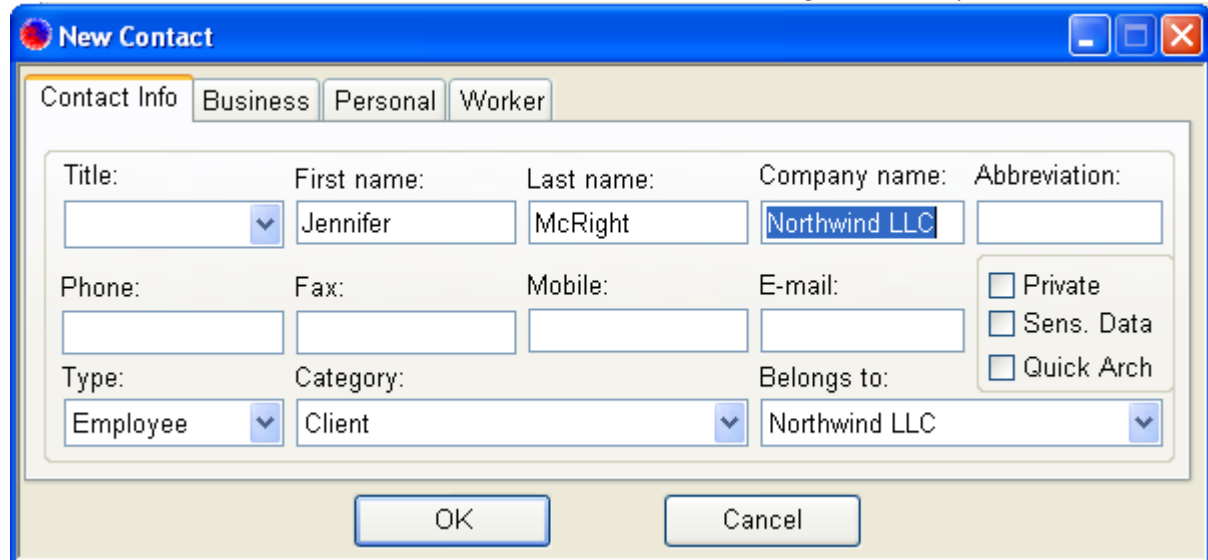
Buttons: OK, Cancel

Enter the name of the company or organization in the field *Company name*. Ensure that a proper contact type and a proper contact category are selected. Enter also the other needed information.

Finally press the button *OK*. The new contact, representing a company or organization, will be added to the list of the available contacts, and displayed under the *Companies and Organizations* branch in the contacts' tree.

Adding an Individual Contact belonging to a Company or Organization

To add a contact representing a person that belongs to a company or organization, right click on the corresponding contact of the parent company or organization in the tree of the available contacts and select *New Contact* from the context menu. The *New Contact* dialog will show up.



The screenshot shows the 'New Contact' dialog box with the following fields and values:

Field	Value
Title	[Dropdown]
First name	Jennifer
Last name	McRight
Company name	Northwind LLC
Abbreviation	[Empty]
Phone	[Empty]
Fax	[Empty]
Mobile	[Empty]
E-mail	[Empty]
Type	Employee
Category	Client
Belongs to	Northwind LLC

Checkboxes: Private, Sens. Data, Quick Arch.

The fields *Company name* and *Belongs to* are automatically set to the name of the parent company or organization. The type of the contact is set by default to *Employee*, and the contact's category is set to the category of the parent company or organization. You can freely change the type or the category of the contact as needed. Enter the first and the last name of the contact, and also the other needed information. Finally press the button *OK*. The new contact will be added to the list of the available contacts, and displayed under the contact representing its parent company or organization in the contacts' tree.

Adding an Individual Contact not belonging to a Company or Organization

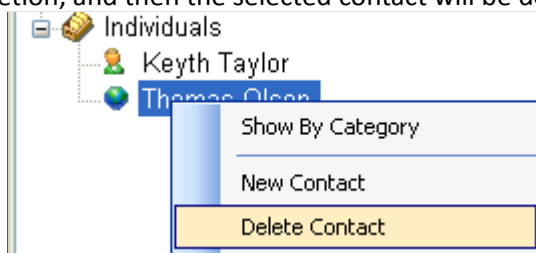
To add a contact representing a person, which does not belong to an existing company or organization in the tree, right click on the tree of the available contacts and select *New Contact* from the context menu. The *New Contact* dialog will show up.

Enter the first and the last name of the contact, and also the other needed information. Ensure that a proper type and a proper contact category are selected. Finally press the button *OK*. The new contact representing a person, which does not belong to an existing company or organization in the tree, will be added to the list of the available contacts, and displayed under the *Individuals* branch in the contacts' tree.

If you decide later to assign an existing individual contact to a company or organization, select the corresponding contact, and select on the field *Belongs to* the needed company or organization.

Deleting a Contact

To delete a contact, right click on it and select *Delete Contact* from the context menu. Confirm the deletion, and then the selected contact will be deleted.



If you delete a contact that represents a company or organization, and this contact has one or more individual contacts (persons) belonging to it, after the deletion of the organizational contact, the personal contacts will have their *Belongs to*-fields cleared, and these contacts will be moved under the *Individuals* branch in the contacts' tree.

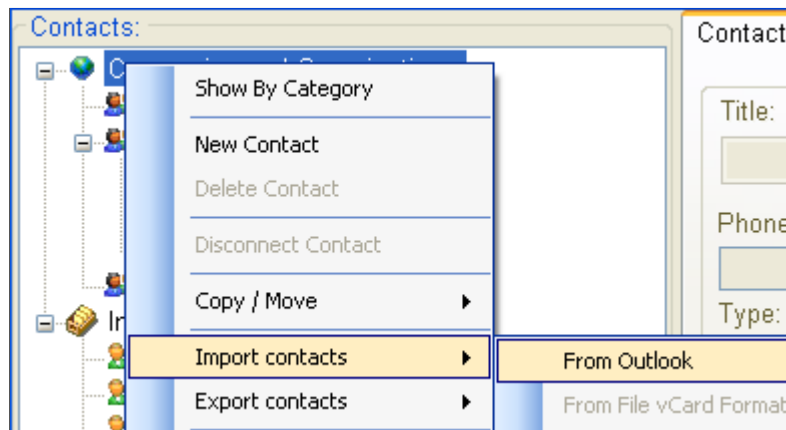
To remove only the relation between a personal contact and its parent company or organization, select the contact in the tree of the available contacts, and select on the field *Belongs to* the empty option. Alternatively you can right click on the personal contact and select *Disconnect Contact* from the context menu. The contact will be moved under the *Individuals* branch in the contacts' tree.

Synchronizing with MS-Outlook Contacts

Smart Flow provides two useful utilities – one to import existing *MS-Outlook* contacts in order to save the manual entry of the same contacts' data, and the other - to export the contacts' changes back to *MS-Outlook*. The both utilities make up a way to synchronize the changes in contacts' data between *Smart Flow* and *MS-Outlook*.

Importing Contacts from MS-Outlook

To import a list of contacts from *MS-Outlook* to *Smart Flow*, right click on the tree of the available contacts and select *Import Contacts / From Outlook* from the context menu. The *Import Contacts from Outlook* dialog will show up.

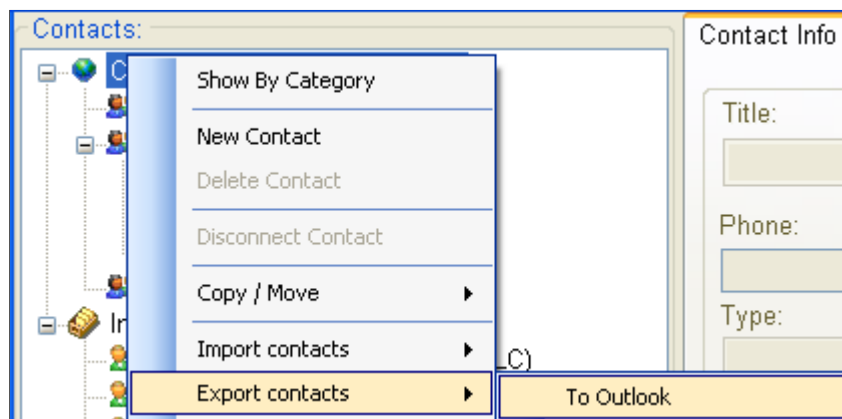


Ensure that all contacts that need to be imported into *Smart Flow* are marked, and then press the button *Import*. The marked contacts will be imported as *Smart Flow* contacts.

You can import the same *MS-Outlook* contacts multiple times. If a contact already exists in *Smart Flow*, it won't be duplicated during the subsequent imports. Only the changes made to the contact's data in *MS-Outlook* will be reflected to the corresponding *Smart Flow* contact's data.

Exporting Contacts to MS-Outlook

To export a list of contacts (or changes of the contacts' data) from *Smart Flow* to *MS-Outlook*, right click on the tree of the available contacts and select *Export Contacts / To Outlook* from the context menu. The *Export Contacts to Outlook* dialog will show up.



Ensure that all contacts that need to be exported to *MS-Outlook* are marked, and then press the button *Export*. The marked contacts will be exported to the corresponding *MS-Outlook* contacts.

You can export the same *Smart Flow* contacts multiple times to *MS-Outlook*. If a contact already exists in *MS-Outlook*, it won't be duplicated during the subsequent exports. Only the changes made to the contact's data in *Smart Flow* will be reflected to the corresponding *MS-Outlook* contact's data.