Contact History

Overview

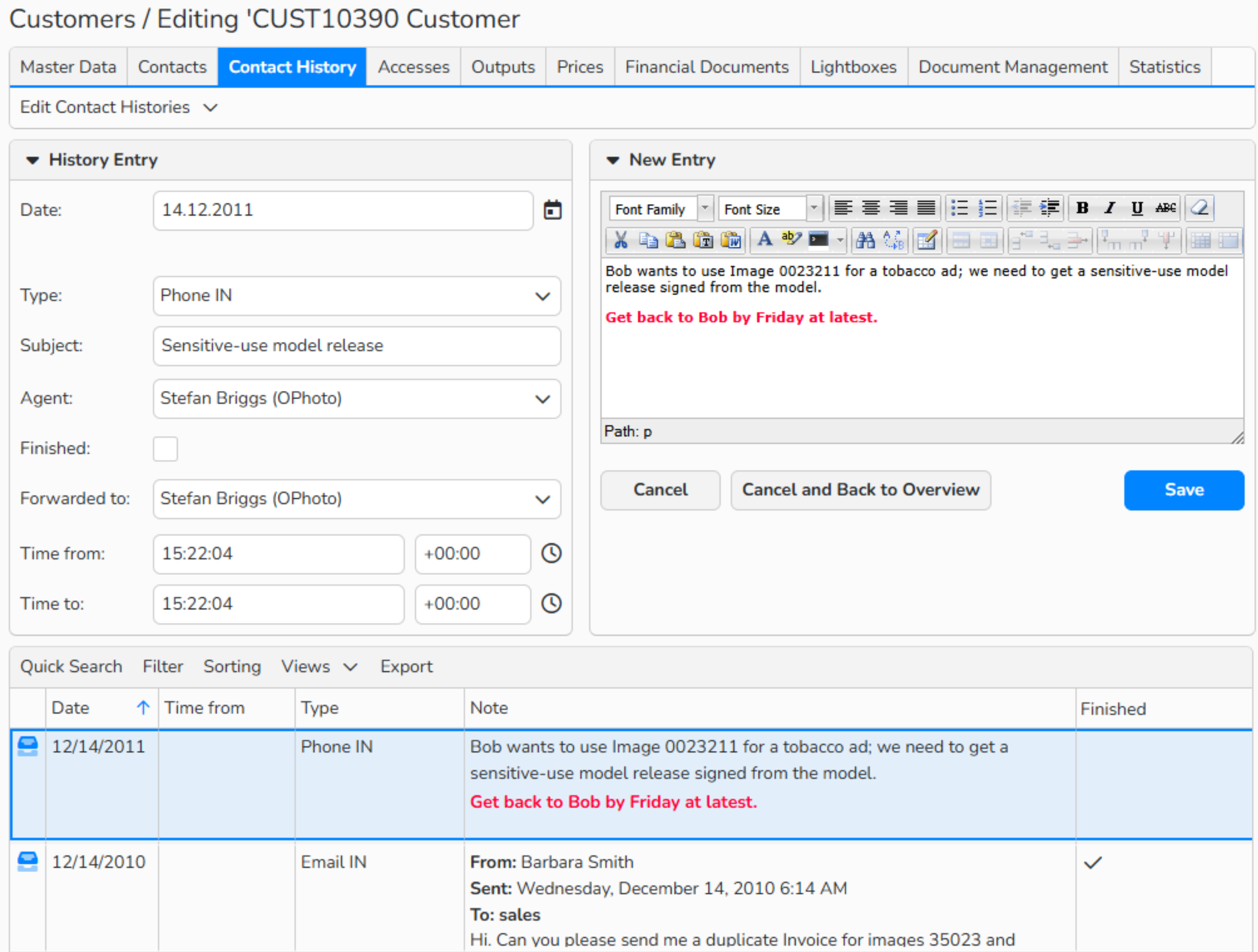
Backstage offers a Contact History feature for you to track all interactions with customers, authors, partners and users. It stores all communication with a company or individual in one central location.

You can easily add a new entry for a contact activity, such as a phone inquiry, email, or fax.

Create contact entries

To create a new entry that records a contact:

1. Go to the relevant system area (**Customers**, **Authors**, **Partners** or **Users**) and select a master data record where you want to add the contact entry.
2. Click the **Contact History** tab.
3. The **Date** and **Time** fields will auto-fill with the current date and time. The **Agent** and **Forwarding** menus will display the IT User who is adding the entry. You can modify this data.
4. Select a communication activity from the **Type** menu.
5. In the **New Entry** field, enter contact details (for example, a phone call summary or an email copy).
6. Click **Save**.



Customer master record: Contact History tab

Setup fields

Date	For all new contact entries, the field automatically populates with the current date. You can adjust this date, if needed. Use the calendar icon to select a new date or simply type in the date.
Type	The dropdown menu lists types of contact activity. You can create custom types under **Administration > Settings > Activity Types**.
Subject	Here you can enter any identifying information -- an internal project name or a short summary.

Agent/Forwarding	By default, the field displays the name of the IT User currently logged into picturemaxx Backstage and creating the entry. A different user can be selected, if needed. The field displays the employee involved in the contact activity (who received the phone call or email, etc.). Use the **Forwarding** menu to assign the entry to another employee. You can also assign both fields to the same person. Both menus contain all the users from **Administration > Users**, where you can edit existing users or create new ones.
Finished	Enable the option to mark the contact activity as complete and indicate no follow up is needed.
Time from **Time to**	For all new contact entries, the fileds automatically populate with the current time. You can modify these times, if needed. The two fields let you track the time spent on a contact activity.
New Entry	Here you can add details about the interaction — such as an email copy or key points from a call. The field offers standard Backstage editing tools.

Manage contact entries

To view a list of contact entries for a company or an individual, go to the appropriate system area — **Customers**, **Authors**, **Partners** or **Users** — select a master record, and then click the **Contact History** tab.

The list of contact entries is always sorted by date and time, with the most recent entries on the top.

Create a new entry

- To add a new contact entry, select **Edit > Add**.

Copy an existing entry

- To duplicate an existing contact entry, select it and click **Edit > Copy**.

Delete an existing entry

- To remove an existing Activity Type, highlight it and select **Edit > Delete**.

> **Note**
>
> You can use the table's built-in tools to search, filter, and sort records. For more details, including how to create custom views and export data, see Advanced Table Views.