Contacts

Overview

Add and manage contacts for your customers, partners, authors, or users. Create a contact once and link it to multiple master data records using cross-area assignments.

You can add contacts in the following master data areas:

- **Sales > Customers** and **Partners**
- **Purchasing > Authors and Partners, Author Pools and Syndicates**
- **Administration > Users**

Create contacts

You can create, edit, and manage multiple contacts within each master data record.

To add a new contact:

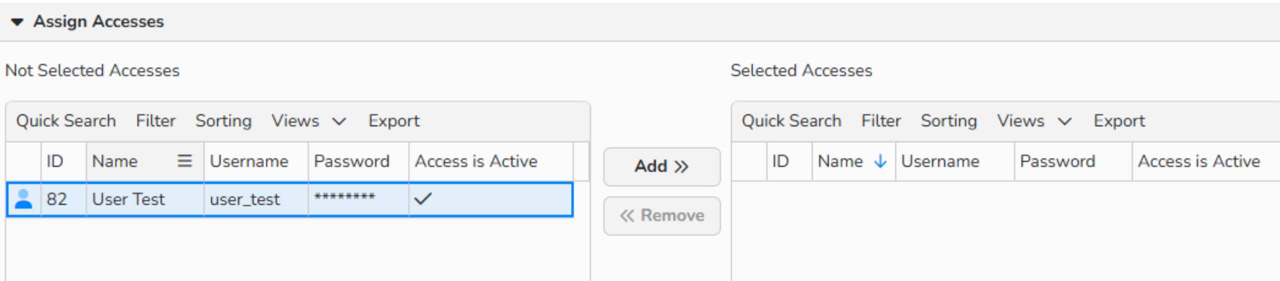
1. Navigate to one of the master data areas (Sales > Customers, Purchasing > Authors, Administration > Users).
2. Open the master data record by double-clicking it or selecting **Edit > Open**.
3. Switch to the **Contacts** tab and select **Manage Contacts > New**.
4. Enter the contact details:
    - **Master Data** details: Salutation and name.
    - **Communication**: The system automatically fills in phone, fax, and email from the master data record; you can edit or overwrite them as needed.
    - **Extra Data** details: Department, role, and birth date.
    - **Company Data**: he system automatically fills in the company details from the master data record.
    - **Comments**: Add any notes about the contact.
5. Click **Save.**

Assign Accesses

You can link an access to a contact if you have the access already created in the master data record.

To assign access in the **Contacts** tab of a master data record:

- In the **Assign Accesses** panel, select an access from **Unassigned Accesses** and click **Add** to move it to **Assigned Accesses.**
- To remove access from a contact, select it and click **Remove**.



Master data record: Contacts tab: Assign Accesses panel

Assign Newsletter Lists

Newsletter lists are distribution lists for your regular newsletter. Only records assigned to a specific list will be included in the mailing.

To assign a list to a contact in the **Contacts** tab of a master data record:

- Select a newsletter list from **Unassigned Lists** and click **Add** to move it to **Assigned Lists**.
- To remove a list from a contact, select it and click **Remove**.

> **Note**
>
> For more details refer to these FAQs: Salutations, Departments and Job Titles, Newsletter Lists.

Add a contact photo

You can personalize any contact by uploading their photo:

1. In the **Image** panel, click the lookup button to open the Document Management dialog.
2. In the **Document Management** dialog, click **Upload Files**.

3. In the **Upload** dialog, click **Add Files** to select the photo from your external folder, or drag and drop the image into the upload area.
4. Click **Upload all files** and when uploading is complete click **Back to Overview**.
5. Back in the **Document Management** dialog, pick the photo and click **Choose**.

> **Note**
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> **Storage Location**
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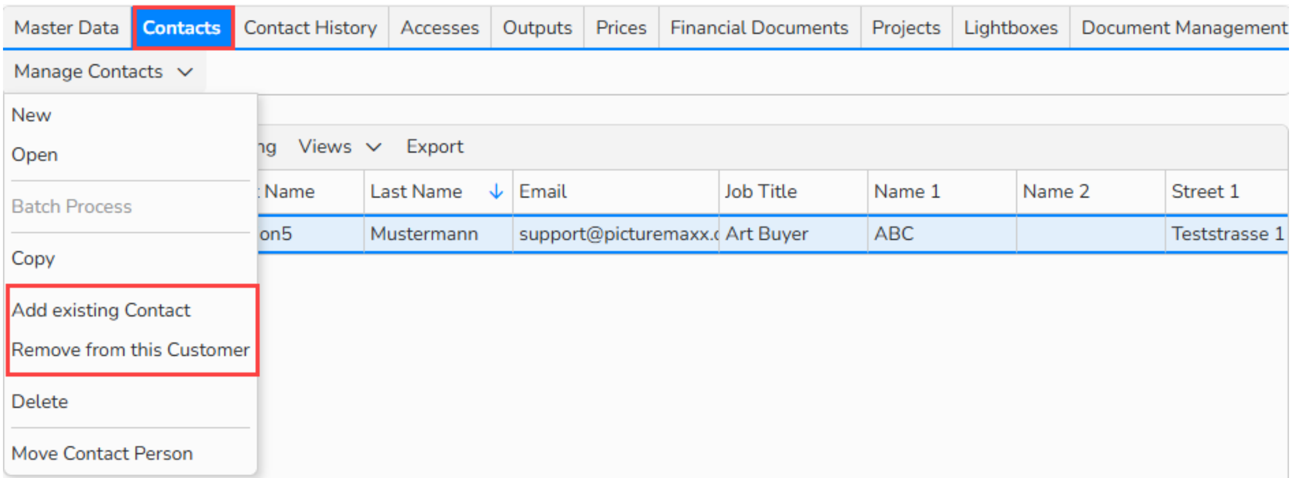
> The media file is stored in **Administration > Templates > Document Templates** in the **Contact Photos** folder. If you also use Webgate with My Account, any profile photo the user uploads there is automatically applied to their system contact.

Link contacts to other areas

Create a contact once and use it across multiple areas, such as Sales and Purchasing.

To assign an existing contact:

1. Open the master data record.
2. In the **Contacts** tab, choose **Manage Contacts > Add Existing Contact**.
3. From the list of all contacts, select the ones you need:
    - For a continuous range: **Shift + Click**
    - For a non-continuous range: **Ctrl (PC) or Cmd (Mac) + Click**
4. Click **Choose** to confirm.



Master data record > Contacts tab: Manage Contacts menu options

Remove cross-area contacts

You can remove cross-area contacts from specific master data records without deleting them. The contact remains in the system but is no longer linked to that area.

To remove a contact:

1. Open the master record.
2. In the **Contacts** tab, select a contact you need to delete and click **Manage Contacts > Remove from this Author/Customer/Partner/User**.
3. Click **OK** to confirm.

> **Note**
>
> **Unassigned vs Deleted Contacts**
>
> You can reassign contacts that are no longer linked to any master data record at any time. If you delete a contact, the system permanently removes it from all master records, regardless of previous assignments.

Manage contacts

Management options are available in the **Contacts** tab of each master data record:

- To create contact, click **Manage Contacts > New**.
- To edit contact, select a record and click **Manage Contacts > Open**.
- To copy contact, select a record and click **Manage Contacts > Copy**.
- To delete contact, select a record and click **Manage Contacts > Delete**.
- To apply changes to multiple selected records at once:
  - Multi-select the records you need to edit.
    - Continuous selection: Press Shift + Click
    - Non-continuous selection: Press Ctrl + Click (Windows) or Cmd + Click (Mac)
  - Click **Manage Contacts > Batch Process**.

> **Note**
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> 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.