
Using Contact Management

Session Using Contact Management

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Overview A new feature in Spectrum® version 14 is Contact Management. Now you can set up contacts for vendors, projects, customers, sites, and so on. Contacts can be affiliated with vendors, customers, or other organizations; they can also be your own employees. Learn how to use the new Contacts Administration screen to manage contacts, and use attributes to identify them. Finally, see how these contacts are automatically available to project managers on their jobs.

Key Concepts

- Defining and using contacts
- Using Contacts Administration to set up and manage contacts
- Viewing contacts on the job

Defining and using contacts

In Spectrum version 14, contacts are individuals, organizations, and roles that you can store in a centralized database. Contacts come from a variety of sources in Spectrum. Even better, they can be set up and managed at their source or on the new Contacts Administration screen.

Regardless of where the contact is entered in Spectrum, you will manage the information in the same manner.

Properties Tab

Hot Key: ALT + P

The screenshot shows the 'Edit Contact' window for 'Hudson James'. The 'Properties' tab is active. The contact's name is 'Hudson James' and the primary telephone is '980 776-5500'. The title is 'President' and the remarks are 'Don't hesitate to call if any issues arise'. The attributes listed are 'ESTIMATOR; OWNER; PROJECT MANAGER; SUBCONTRACTOR; SUPERINTENDENT'. The email is 'hgriffin@aaa.net'. A checkbox for 'Default as a job contact on contracts / subcontracts?' is checked. The telephone list includes entries for 'MOBILE / CELL', 'AAA Industrial' (checked), and 'AAA Industrial: California Location'. The 'Build Contact Attributes List' dialog is open, showing a list of attributes to be selected for this contact.

Description	Relationship	Telephone
MOBILE / CELL	Contact	206 555-1111
✓ AAA Industrial	Vendor	980 776-5500
AAA Industrial	Vendor Fax	980 776-8181
AAA Industrial: California Location	Vendor location	651 966-1231
AAA Industrial: California Location	Vendor location Fax	651 966-1217

All Contact Attributes	This Contact's Attributes
ARCHITECT	ESTIMATOR
BILLING ADMIN	OWNER
DESIGN TEAM	PROJECT MANAGER
ESTIMATOR	SUBCONTRACTOR
FOREMAN	SUPERINTENDENT
OWNER	
PAYABLES	
PROJECT MANAGER	
SUBCONTRACTOR	
SUPERINTENDENT	

The contact's name and primary telephone number will always be visible at the top of the window, regardless of which tab you are on. You can jot a remark about the contact in the 250-character text box.

Attributes are user-defined identifiers assigned to a contact. Click the box or drop-down arrow to open the Build Contact Attributes List window.

Each contact can have up to three different email addresses.

When the contact has access to Spectrum, text indicates whether the contact is "Authorized to access Spectrum." In the picture above, the contact does not have access.

When you select the **Default as a job contact on contracts / subcontracts** checkbox, and the organization is used as a job customer or a job subcontract, then this contact automatically displays on the Job Contacts screen.

In the Telephone section, each contact can have an unlimited amount of phone numbers. If the contact is associated with a customer or vendor, the customer or vendor's address displays. If

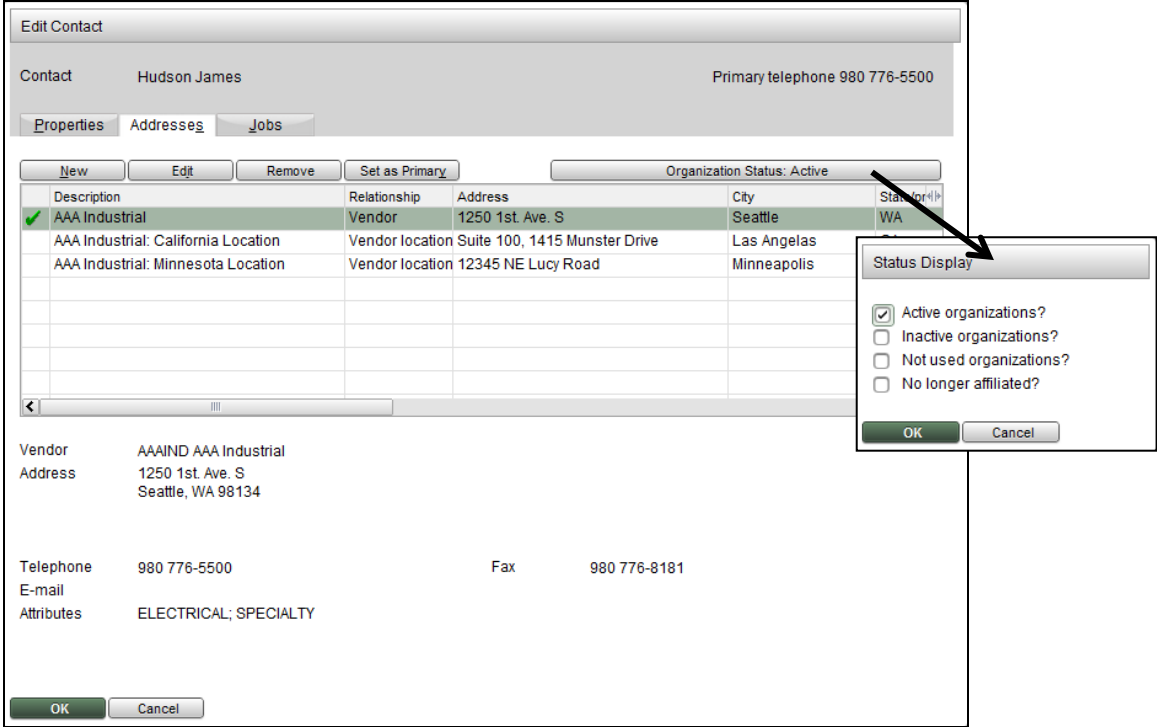
additional Bill-to Addresses (for customers) or Locations (for vendors) are utilized, that phone information will also default onto this list. You can also add other phone contacts.

In the vendor example above, the main phone and fax display. As additional Locations are added, that information also defaults in. Finally, a cell phone has been manually added.

Contacts are usually not deleted from Spectrum. Instead, you can set them to an Inactive status or even remove their association with an organization. Only the administrator can purge contact information using the Contacts Administration screen.

Addresses Tab

Hot Key: ALT + S



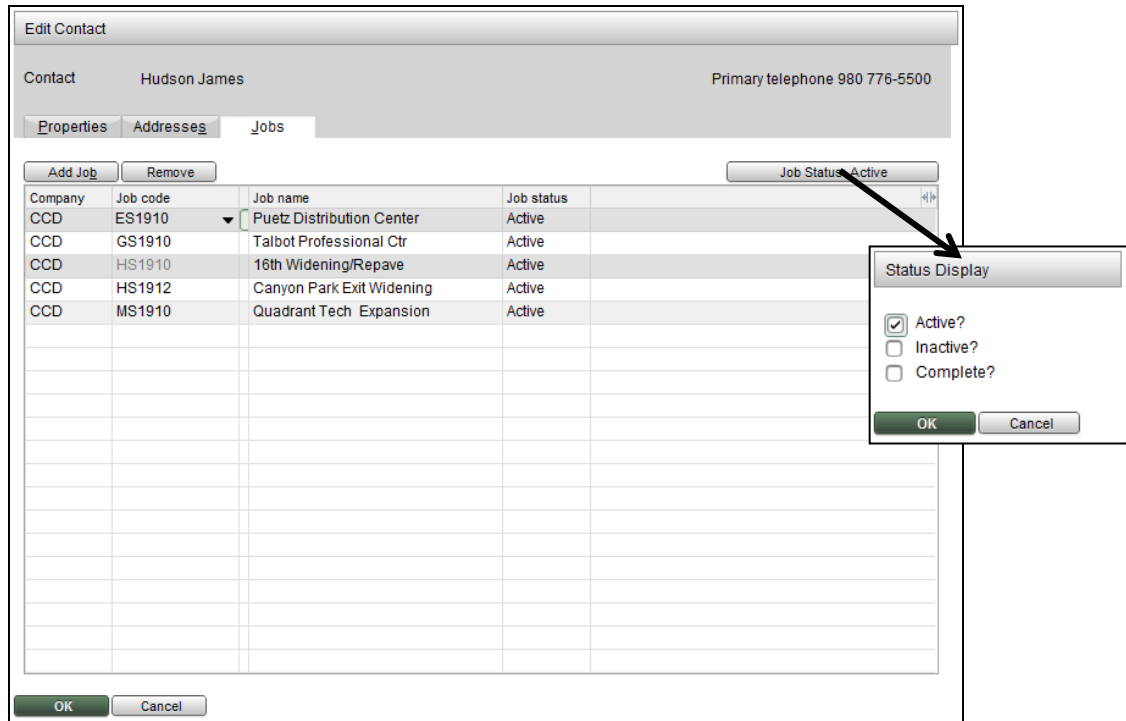
Each contact can have an unlimited amount of addresses. If the contact is associated with a customer or vendor, then the main address appears in this list. If additional Bill-to Addresses or Locations are utilized, then those addresses will also default onto this list.

You can also add additional addresses. Notice that there is a **Remove** button, but not a **Delete** one. This is by design as only the administrator can purge (delete) information relating to a contact.

Click the **Set as Primary** button to select the default address for this contact.

Jobs Tab

Hot Key: ALT + J



Click this tab to view and manage jobs that the contact is associated with. Remember that if the **Default as a job contact on contracts / subcontracts** checkbox is selected, you will not need to come to this screen to add the contact to the job.

Types of Associations

You can consider a contact to be associated with an organization when it is added to the specific organization's record. Each contact can be associated with more than one organization.

Contacts can be associated with the following types of organizations:

- Vendor
- Customer
- Employee
- Other

Vendor Contacts

Unlimited vendor contacts are available. During the upgrade to version 14, any existing contact information will be added to the vendor's contact screen.

Select the Contacts link on the Vendor Info Bar to view the Vendor Contacts page.

Customer Contacts

Unlimited customer contacts are available. During the upgrade to version 14, any existing contact information will be added to the customer's contact screen.

Select the Contacts link on the Customer Info Bar to view the Customer Contacts page.

Employee Contacts

Due to the sensitive nature of employee information, employee contacts follow a different set of rules from vendor and customer contacts. Instead of displaying the employee's home address and phone information, only certain fields display on an employee contact.

Employee Contact Identifier

Employee Main Properties

Employee Personal Information

Edit Contact

Contact: Brett Boone Primary telephone: 206 555-4321

EMPLOYEE CONTACT

Information displayed on this tab is from Payroll records. No editing is allowed, except for additional phones.

Contact name: Brett Boone Status: Active

Title: ELECTRICIAN

Remarks: OK to call early in the morning.

Attributes: ESTIMATOR; FOREMAN; PROJECT MANAGER

E-mail: bboone@abc.com
Authorized to access Spectrum.

Telephone

Description	Relationship	Telephone	Extension	Comment
✓ Mobile phone	Contact	206 555-4321		
Work extension	Contact		x123	

Properties

The contact's name, title, and assigned attributes entered on the Employee Main Properties screen display on any Contact database screen.

From the Payroll | Employee Personal Information screen, only the **Work mobile phone**, **Work extension**, **Work email**, and **Contact remark** display for an employee contact. The user is not allowed to edit or change any of these fields.

You can add and modify telephone and other information. Additional telephone information may be added. Information added to this screen can be modified by the user.

Addresses

Address information does not default from Payroll, and additional addresses and phone numbers do not flow back to Payroll. To maintain employee security, the address information only stays within the Contact database. Other addresses can be entered on the Addresses tab the same way additional telephone information is added.

Jobs

Click this tab to view and manage jobs that the employee is associated with.

Other Organizations

You may come across organizations that are not associated with a vendor, customer, or employee. In Spectrum, these are called Other Organizations. Another way to think of these types of contacts is that these are folks that you don't write checks to or receive checks from. Other Organizations File Maintenance is a new screen that allows you to track and manage non-vendor and non-customer organization associated contacts. There are two ways to access this screen:

Organizations Button in Job Contacts Add other organizations by clicking the **Organizations** button on the Command Bar in Job Contacts.

The Site Map The Other Organizations File Maintenance screen is located in System Administration | Contacts.

Regardless of the method selected, the process of creating a new organization is the same.

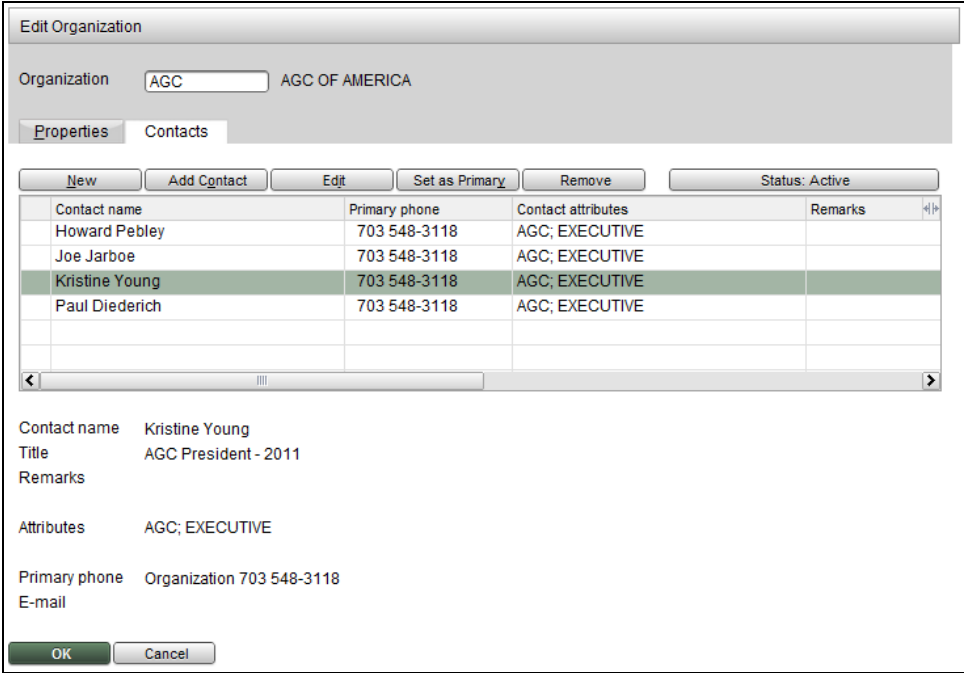
Properties

Hot Key: ALT + P

The screenshot shows the 'Edit Organization' dialog box. At the top, the title is 'Edit Organization'. Below the title bar, there is a field for 'Organization' with the value 'AGC' and a dropdown arrow, and the text 'AGC OF AMERICA' to its right. Below this is a tabbed interface with 'Properties' and 'Contacts' tabs. The 'Properties' tab is active. The 'Name' field contains 'AGC OF AMERICA'. The 'Remarks' field contains 'Good resource for info'. The 'Attributes' field is a dropdown menu showing 'ARCHITECTURAL; CATERING'. The 'Status' field is a dropdown menu showing 'Active'. Below these is a section for 'Primary communication' with a horizontal line. Under this line are fields for 'Telephone', 'Extension', 'Fax', and 'Address'. The 'Telephone' field is empty, 'Extension' is empty, 'Fax' contains '703 548-3119', and 'Address' contains '2300 Wilson Blvd. Arlington, VA 22201 USA'. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

Contacts

Hot Key: ALT + O



Other organizations have their own contacts as well. These can be entered directly by clicking the **New** button. You can also add a contact already associated with a vendor (or customer) organization to this record.

Associating a Contact to Multiple Organizations

Spectrum allows one contact to be associated with multiple organizations. This means that the contact can be attached to a vendor and customer at the same time. It also means that an employee contact can be associated with a vendor, customer, and other organization.

Instead of clicking the **New** button, click the **Add Contact** button.

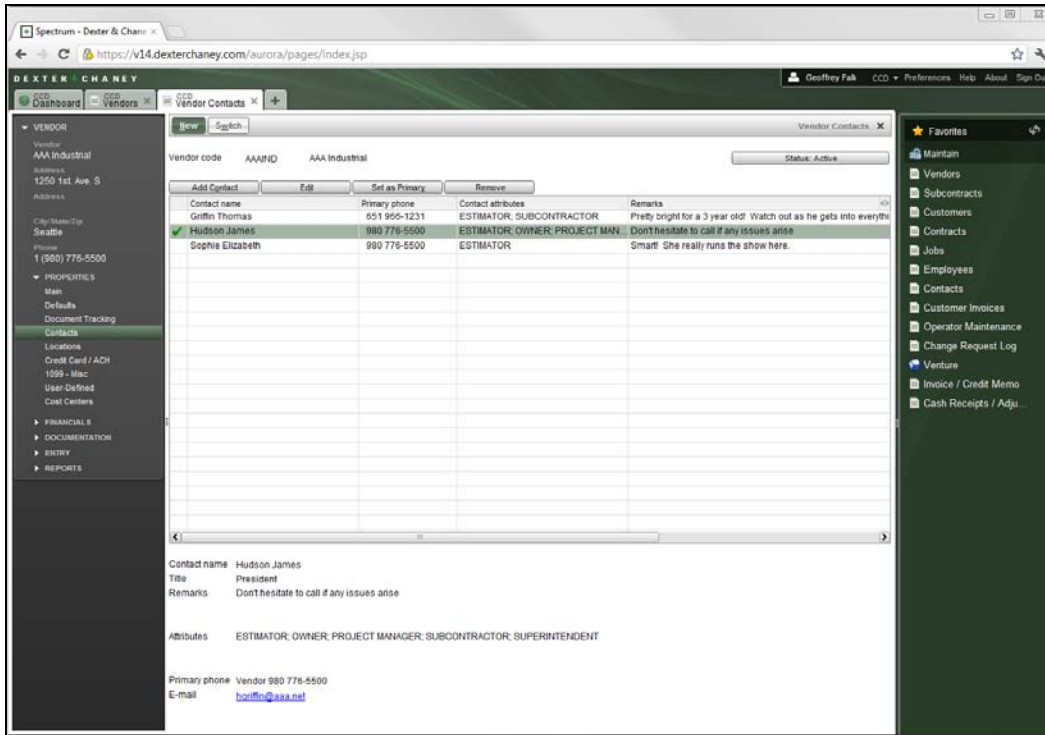
New Button Opens the New Contact window.

Add Contact Button Opens the Search Contacts window. Select the contact(s) that you want to associate with this organization.

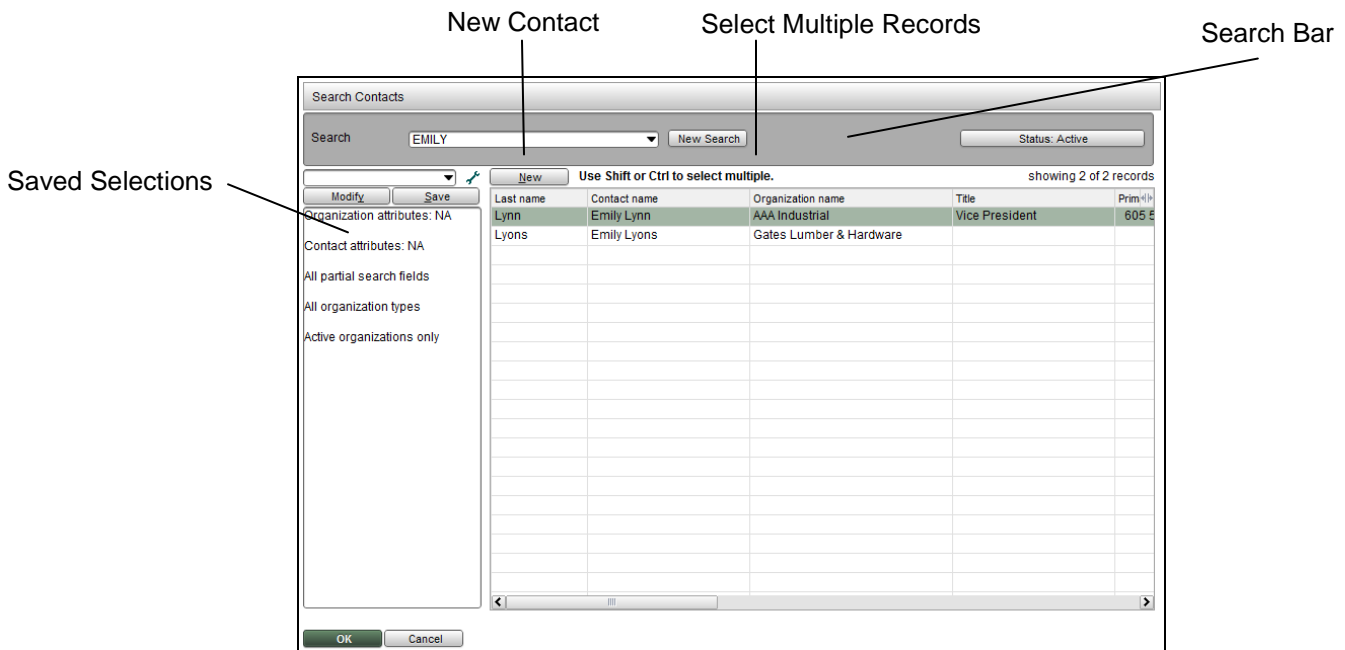
Example:

We want to add Emily Lynn as a contact to vendor AAA Industrial. Emily is already in Spectrum as the Vice President at Castle Rock Bowling, a customer of ours.

1. Navigate to Accounts Payable | Vendors | Contacts. Enter the Vendor Code AAAIND.



2. Click **Add Contact**. The **Search Contacts** window displays.



3. Type "Emily" in the Search Bar and click **Go**.
4. Highlight "Emily Lynn" and click **OK**.

So how does the contact record for Emily Lynn look now?

The telephone information from both the vendor (AAA Industrial) and the customer (Castle Rock Bowling) are listed.

Edit Contact

Contact: Emily Lynn Primary telephone 605 555-8741

Properties | **Addresses** | Jobs

Contact name: Emily Lynn Status: Active

Title: Vice President

Remarks: Works at AAA Industrial and Castle Rock.

Attributes: ARCHITECT; DESIGN TEAM; OWNER

E-mail: elynn@crbowling.com 0 More

Not authorized to access Spectrum.

Default as a job contact on contracts / subcontracts?

Telephone

New Edit Delete Set as Primary

Description	Relationship	Telephone	Extension	Comment
AAA Industrial: California Location	Vendor location Fax	651 966-1217		
AAA Industrial: Minnesota Location	Vendor location	888 123-6655		
AAA Industrial: Minnesota Location	Vendor location Fax	888 123-9944		
<input checked="" type="checkbox"/> Castle Rock Bowling	Customer	605 555-8741		
Castle Rock Bowling	Customer Fax	605 555-3155		

OK Cancel

The addresses from the vendor, vendor location, and customer display. If there was a bill-to address for this customer, it would also display.

Edit Contact

Contact: Emily Lynn Primary telephone 605 555-8741

Properties | **Addresses** | Jobs

New Edit Remove Set as Primary Organization Status: Active

Description	Relationship	Address	City	State/pr
AAA Industrial	Vendor	1250 1st Ave. S	Seattle	WA
AAA Industrial: California Location	Vendor location	Suite 100, 1415 Munster Drive	Las Angelas	CA
AAA Industrial: Minnesota Location	Vendor location	12345 NE Lucy Road	Minneapolis	MN
<input checked="" type="checkbox"/> Castle Rock Bowling	Customer	1818 SW Charleston Ave	Phoenix	AZ

Customer: CASROC Castle Rock Bowling

Address: 1818 SW Charleston Ave
Phoenix, AZ 98888

Telephone: 605 555-8741 Fax: 605 555-3155

Attributes: PRIVATE

OK Cancel

Creating Attributes

Attributes are user-defined identifiers assigned to contacts and organizations. During the upgrade to version 14, you will receive a starter list to help set up attributes. You can always delete unnecessary attributes.

Starter list for Organization Attributes

Attribute	Vendor	Customer	Other
ARCHITECTURAL			X
COMPLIANCE			X
ELECTRICAL	X		
ENGINEERING			X
GENERAL CONTRACTOR		X	
GOVERNMENT	X	X	X
HAULER	X		
MATERIALS	X		
MECHANICAL	X		
OUTSIDE CPA			
OWNER		X	
OWNER'S REP		X	
PLUMBING	X		
PRIVATE		X	
PUBLIC		X	
SPECIALTY	X		
SUBCONTRACTOR	X		
SUPPLIER	X		

You will receive a warning message when you try to delete an attribute that is currently used in the system, but you can proceed. The deleted attribute will remain linked to the organization until it is manually removed. If the attribute is deleted in error, you can simply set it up again.

Starter list for Contact Attributes

Attribute
ARCHITECT
BILLING ADMIN
ESTIMATOR
FOREMAN
PAYABLES
PROJECT MANAGER
SUBCONTRACTOR
SUPERINTENDENT

Contact attributes will not be automatically assigned during the upgrade to version 14.

Attributes cannot be added on the fly. This is by design in order to allow the Spectrum Administrator to manage and control the attributes used by other contacts or organizations. Two different master lists of attributes are available. One is for organizations and the other is for contacts themselves.

Organization Attributes

Navigate to **System Administration | Contacts | Organization Attribute**. Each organization attribute can be further defined for use on vendors, customers, and other organizations.

Contact Attributes

Navigate to **System Administration | Contacts | Contact Attribute**.

Using Contacts Administration to set up and manage contacts

Contacts Administration is a high security screen as users have the ability to add, edit, or delete any non-employee contact from the database. It is not intended to be used as a global search screen for the company.

The screenshot shows the 'Contacts Administration' window in a web browser. The interface includes a search bar at the top, a 'New Contact' button, and a 'Status: Active' dropdown. Below these is a table of contacts. Annotations with lines pointing to specific parts of the interface are as follows:

- New Contact:** Points to the 'New' button in the top left.
- Search Bar:** Points to the search input field at the top.
- Status Button:** Points to the 'Status: Active' dropdown menu.
- Saved Selections:** Points to the left-hand sidebar containing filters like 'Organization attributes: NA', 'Contact attributes: NA', and 'Active organizations only'.
- Search Criteria:** Points to the search input field.
- Multi-select rows:** Points to the first few rows of the contact table.

Last name	Contact name	Organization name	Title	Primary phone	Contact attributes
Armstrong	William Armstrong	ABC Construction Company			
Armstrong	Albert Armstrong	ABC Construction Company			
Boone	Brett Boone	ABC Construction Company	ELECTRICIAN	206 555-4321	ESTIMATOR; FOREMAN; PRO
Brass	Mike D Brass	ABC Construction Company			
Brass	Mikey D Brass II	ABC Construction Company			
Buhner	Jay Buhner	ABC Construction Company	JOURNEY MASON	425 555-8865	
Cameron	Mike Cameron	ABC Construction Company	CARPENTER	206 555-1111	
Chaney	John B. Chaney	ABC Construction Company	JOB SUPERINTENDENT	(ext. x205)	
Cobb	Ty Cobb	ABC Construction Company	CARPENTER	206 555-4887	ESTIMATOR
Falk	Geoffrey Falk	ABC Construction Company	Ditch Digger	612 555-3141	BILLING ADMIN; CPA; PRETT
Griffey Jr.	Ken Griffey Jr.	ABC Construction Company	JOB SUPERINTENDENT	206 555-9220	
Jackson	Shoeless Joe Jackson	ABC Construction Company	EQUIP MAIN FOREMAN	206 555-9711	
Lobo	Rebecca Lobo	ABC Construction Company	CARPENTER	425 555-1189	
Martinez	Edgar Martinez	ABC Construction Company	DOZER DRIVER	206 555-1134	
Miller	Sharon Miller	ABC Construction Company	ELECTRICIAN	-None	PROJECT MANAGER
Moyer	Jamie Moyer	ABC Construction Company	SHOP MANAGER	206 555-6415	SUPERINTENDENT
Ripkin	Cal Ripken Jr.	ABC Construction Company	SMOOTH OPERATOR	206 555-1189	
Rodriguez	Alex Rodriguez	ABC Construction Company	EQUIPMENT MANAGER	206 555-7713	
Schwartz	Mark Schwartz	ABC Construction Company			EXECUTIVE; HAS NICE HAIR
Smith	Susan Smith	ABC Construction Company			
Steinbrenner	George Steinbrenner	ABC Construction Company	PERSONNEL MANAGER	206 555-1596	
Storm	Hannah Storm	ABC Construction Company	CONTROLLER	206 555-1987	
Suzuki	Ichiro Suzuki	ABC Construction Company	OPERATOR JOURNEY...	206 726-8937	
Wilson	Dan Wilson	ABC Construction Company	OPERATOR APPRENTICE	253 555-7531	

The Search Contacts window is similar to Contacts Administration. Once you understand how to use Contacts Administration, you understand how to use the Search Contacts window.

You can select multiple records at once and then set their status to Inactive. You can also delete multiple rows or even create an email to multiple contacts as well.

Important: You cannot delete an employee contact record from this screen.

Viewing Contacts on the Job

Now let's look at how project managers can view these contacts on their jobs. Using the Job Info Bar, the screen shot below displays the Job Contacts page.

The screenshot shows the Dexter+Chaney software interface. The top navigation bar includes 'ABC Dashboard', 'ABC Jobs', and 'ABC Contacts'. The main content area is titled 'Job Contacts' and displays the following information:

Job code: 300 King County, Highway 18

Key personnel:

Superintendent	EMP102	Albert Armstrong
Estimator	LOBREB	Rebecca Lobo
Project manager	MILSHA	Sharon Miller

Job contacts:

Last name	Contact name	Organization name	Primary phone	Contact attributes	Remarks
Abraham	Tabatha Abraham	King County Public Works Dept	206 555-1212	GOVERNMENT	
Archer	Bob Archer	George Olafson	612 554-5515	ARCHITECT	
Boone	Bret Boone	Employee	206 555-4321	ESTIMATOR; FOREMAN; PROJECT MAN...	OK to call ear
Caulfield	Joe Caulfield	Employee	206 555-7987		
Chaney	John B. Chaney	Employee	(ext. x205)		
Charleston	Charlie Charleston		206 623-9088	SUBCONTRACTOR	
Falk	Geoffrey Falk	Employee	612 555-3141	BILLING ADMIN; CPA; PRETTY GOOD C...	Hello!
Greenthumb	Johhny Greenthumb II	456 Garden Supply	206 878-3344	SUBCONTRACTOR	
Griffin	Hudson Griffin		514 555-3481	ARCHITECT	
Lester	Alex Lester	Lester & Son Plumbing	206 783-4200	AGC; AVAILABLE EVENINGS; AVAILABL...	Good buy to w
Schwartz	Mark Schwartz	Employee		EXECUTIVE; HAS NICE HAIR	
Spargo	Nelson Spargo	Lester & Son Plumbing	206 783-4200	ESTIMATOR	
Zenske	Tom Zenske	King County Public Works Dept	206 264-5555	GOVERNMENT	

When you first arrive at this page, you will see all contract and subcontract contacts that are marked as **Default as a job contact on contracts / subcontracts** for this job. You can add additional contacts as needed.

Notice that you cannot delete a contact. Instead you can remove it from this job.

During the upgrade to version 14, only the key personnel that are defined with Employee Codes will be converted onto the Job Contacts list. In other words, if you use the Employee Code to define the Superintendent, Estimator, and Project Manager (like in the example above), the upgrade will also add these three individuals to the Job contacts section of the screen.

Adding Contacts to a Job

Hot Key: ALT + O

To add additional contacts to the job, click the **Add Contact** button. This opens the Search Contacts window. Select one or many contacts and then click **OK** to associate them to the job.

Advanced Contact Search Options

Hot Key: F4 Key

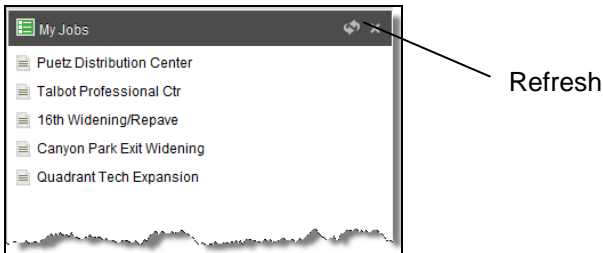
Use the Advanced Contact Search Options window (Hot Key: **F4**) to further refine your search. Here you can define attributes for the organization or the contact.

Use saved selections on the Search Contacts window and Contacts Administration screen to define search templates.

The contact type, **None** indicates that the contact is not affiliated with any organization.

Using the My Jobs App

The My Jobs app on the Dashboard lists all jobs where you are listed as an employee contact.



1. Your Spectrum administrator must first set up your logon credentials.
2. Next, the payroll manager will add this information to your employee record.
 - a. The payroll manager will navigate to your Employee Personal Information screen and enter (or search for) your Operator code.
3. Once these two steps are complete, you can add yourself to the Job Contacts screen.
4. Return to the Dashboard and refresh the My Jobs App to see your changes.

Appendix

Security: When can you add or modify a contact in Spectrum?

To add or edit contacts, you must have security authorization for the New/Edit window of the screens listed below.

Location	Module	Security Function Name	Comments
Vendor Contacts	AP	Edit/New Vendors	You can add a new contact to this vendor. You can edit all associated contacts even if the current vendor is not the only associated organization.
Subcontract Main Properties	AP	Edit/New Subcontracts	All contacts added in this screen are automatically associated with both the vendor and the job related to the subcontract. You do not need security access to Vendors or Jobs.
Customer Contacts	AR	Edit/New Customers	You can add a new contact to this customer. You can edit all associated contacts even if the current customer is not the only associated organization.
Contract Main Properties	AR	Edit/New Contract	All contacts added in this screen are automatically associated with both the customer and the job related to the contract. You do not need security access to Customers or Jobs.
Job Contacts	JC	Add/Edit/Remove Job Contacts	This security setting is different from Add/Edit Jobs.

Location	Module	Security Function Name	Comments
Other Organizations File Maintenance	System Admin	Requires security to this screen	<p>Contacts can only be associated with other organizations by adding contacts (including employee contacts) to this screen.</p> <p>You can edit all associated contacts if you have security for this screen (even if the current organization is not the only associated organization).</p>
Contacts Administration screen	System Admin	Requires security to this screen	You can add and edit all contacts in Contacts Administration across all companies.
Search Contacts window	System Admin	<i>Exception:</i> The New button is hidden in Operator Maintenance since the contact must already exist before it can be associated with an operator code (either by setting up a new employee or external contact).	(Not applicable)

Session Evaluation 2012

Using Contact Management in V14

We hope you have found this session to be informative and beneficial. Each year we depend heavily on these session evaluations to help us determine which courses to offer in the future. Please help us improve our conference by filling out and returning this evaluation at the end of the session. Thank you.

1. How **informative** was this session?

Excellent		Good		Needs Improvement
5	4	3	2	1

If 1-2, please explain: _____

2. How would you rate the **instructor's presentation** of the subject?

Excellent		Good		Needs Improvement
5	4	3	2	1

If 1-2, please explain: _____

3. How useful was the **documentation** for this session?

Excellent		Good		Needs Improvement
5	4	3	2	1

If 1-2, please explain: _____

4. How well did this session meet your **expectations**?

Excellent		Good		Needs Improvement
5	4	3	2	1

If 1-2, please explain: _____

5. Would you be interested in taking a class on the same subject presented at a more advanced level?

YES NO

Additional comments: _____

