
Contact Management Overview

Owner of this document is: Scott Wiacek – swiacek@feedingamerica.org

Purpose of this document

This document describes how to complete the setup to utilize the Relationship Management Contact functionality to supplement information handling for Agencies, Donors etc.

Copyright © Feeding America 2014, All Rights Reserved.

This document may be printed and reproduced only by Feeding America and member organizations.

Table of Contents

PURPOSE	3
MARKETING SETUP	3
GENERAL FASTTAB	4
INHERITANCE FASTTAB	5
DEFAULT FASTTAB	5
INTERACTIONS FASTTAB	6
SYNCHRONIZATION FASTTAB	6
NUMBERING FASTTAB	6
DUPLICATES FASTTAB	7
E-MAIL LOGGING FASTTAB	7
RELATED TOPICS:	7

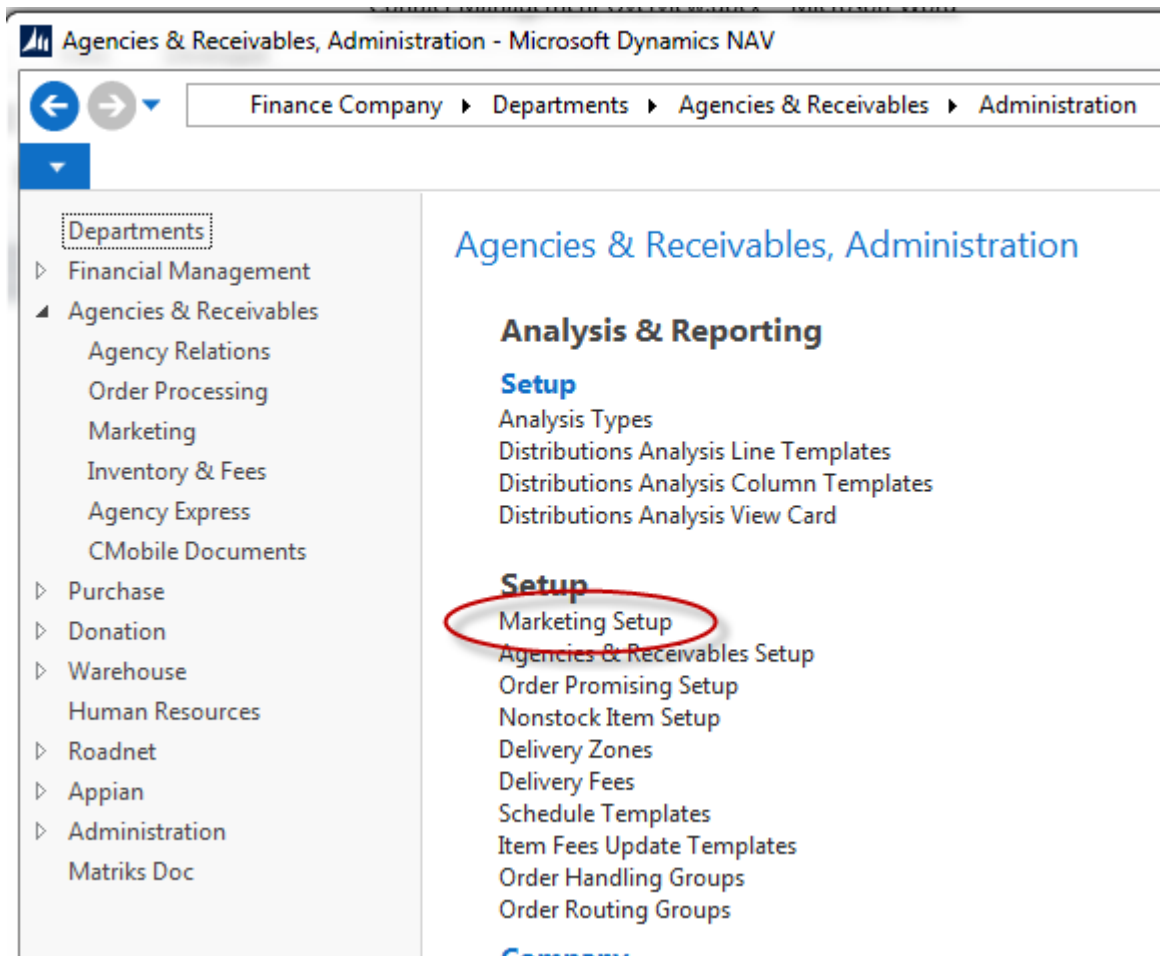
Purpose

Contact Management provides users with the ability to setup and define parameters related to the Relationship Management – Contact functionality. Contacts can be used by food banks to supplement the available Contact fields on Agency Cards, Vendor Cards, Donor Cards, or Shoppers. Please note – if you are hosted by Feeding America, then the email logging functionality may not be supported.

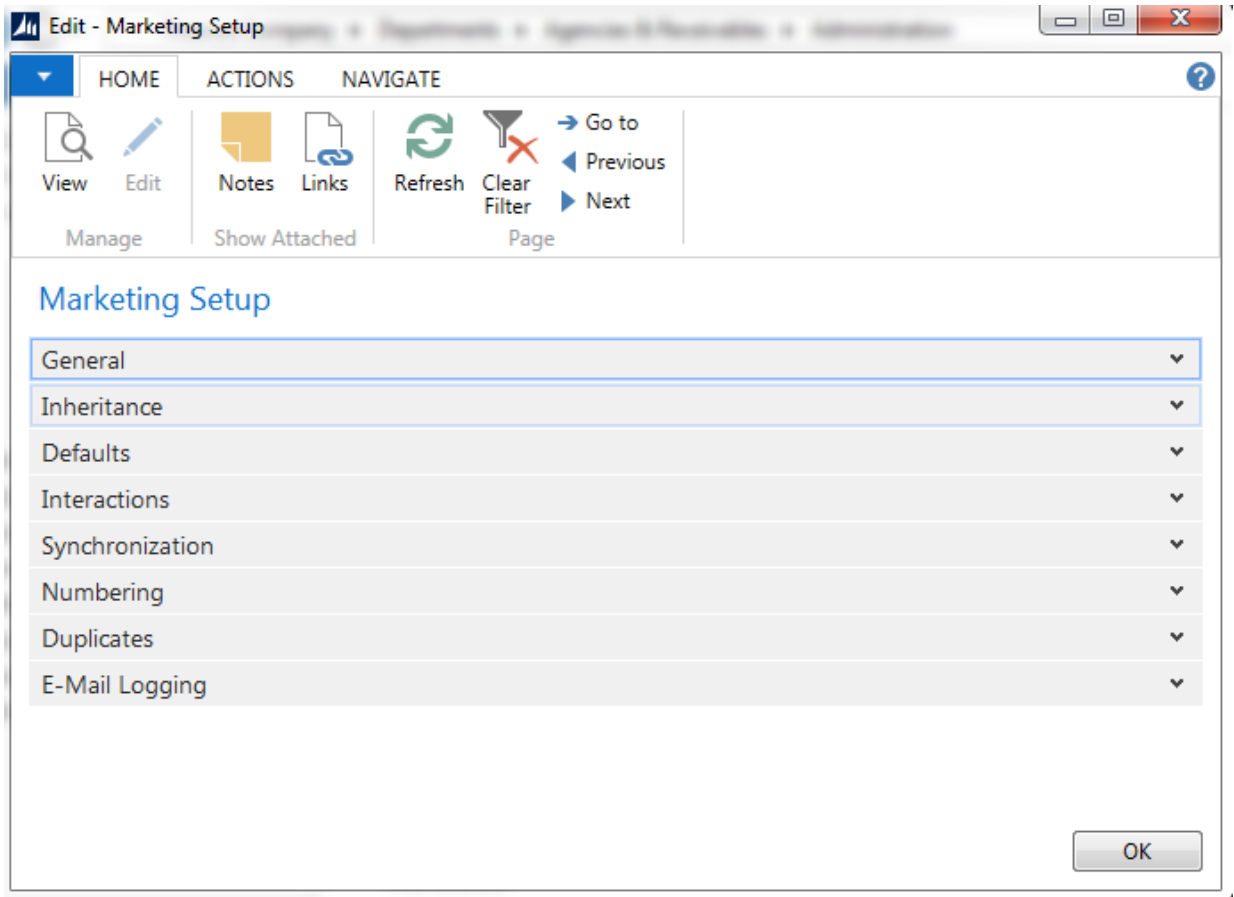
Ceres Object release 4.00.00 is required for the functionality described in this document.

Marketing Setup

1. To access the Marketing Setup go to Departments → Agencies & Receivables → Administration → Setup → Marketing Setup.



2. Update the setup parameters on each of the FastTabs.



General FastTab

The fields on the General FastTab define where the Contact data will be stored.

Marketing Setup

The image shows a close-up of the "General" FastTab in the "Marketing Setup" window. It contains two fields: "Attachment Storage Type" with a dropdown menu currently set to "Embedded", and "Attachment Storage Location" with an empty text input field.

Attachment Storage Type - Indicates where Ceres stores the attachments you want to use when creating interactions. Attachments can be Microsoft Word documents, for example standard letters, Excel, or PowerPoint files. The options are Embedded or External. The only option supported is Ceres is embedded.

Attachment Storage Location – Indicates where the attachments located when the Attachment Storage Type is External.

Inheritance FastTab

A check mark in each of the Inherit fields indicates you want Ceres to copy the address details from the Contact Card of a company to the Contact Card for the individual contact person(s) working for that company.

When you enter a new contact person for a company recorded as a contact, Ceres will copy the content of the fields containing the details of the contact's address (for example the Address and Address 2 fields) from the company's contact card to the person's contact card.

Inheritance ^

Inherit

Responsible Person Code:	<input checked="" type="checkbox"/>
Territory Code:	<input checked="" type="checkbox"/>
Country/Region Code:	<input checked="" type="checkbox"/>
Language Code:	<input checked="" type="checkbox"/>
Address Details:	<input type="checkbox"/>
Communication Details:	<input type="checkbox"/>

Default FastTab

Input a value in each of the fields below that you want Ceres automatically assign to contacts when they are created. For example if the default value in the Agency Rep. Code field was Mary, then Mary would be assigned as the Agency Rep for each contact that is created

Defaults ^

Default

Agency Rep. Code:	<input type="text"/>
Territory Code:	<input type="text"/>
Country/Region Code:	<input type="text"/>
Language Code:	<input type="text"/>
Correspondence Type:	<input type="text"/>
Company Salutation Code:	<input type="text"/>
Person Salutation Code:	<input type="text"/>
Distribution Cycle Code:	<input type="text"/>
To-do Date Calculation:	<input type="text"/>

Interactions FastTab

Interactions are not currently available for Ceres. However, you should select a language in the field indicated below.

Interactions	
Mergefield Language ID:	<input type="text"/>

Synchronization FastTab

The Business Relation Codes identifies that a contact is linked to an Agency, Vendor, Bank Account, Donor, or Shopper. If you enter a Code in this field, Ceres will synchronize the Agency Card, Vendor Card, Bank Account Card, Donor Card, or Shopper and the Contact Card. This means you only have to update information in one place. In addition, it will add a new Contact whenever you create a new Agency, Donor, Shopper etc. When you create contacts from Agencies, Vendors, Bank Accounts, Donors, or Shoppers Ceres automatically assigns the business relation code to these new contacts.

Synchronization	
Bus. Relation Code for	
Agencies:	<input type="text" value="AGENCY"/>
Vendors:	<input type="text" value="VENDOR"/>
Donors:	<input type="text" value="DONOR"/>
Shoppers:	<input type="text"/>
Bank Accounts:	<input type="text"/>
Enable Connector:	<input type="checkbox"/>

Numbering FastTab

The Number fields contain the codes for the Number Series that you want Ceres to use when assigning numbers to Contacts. Place a check mark in the Assign Same Contact Number field if you want the number to be assigned to the Company or People Contact based on the Agency, Vendor, Bank Account, Donor, or Shopper it was created from.

Numbering			
Contact Nos.:	<input type="text" value="RM-CONT"/>	To-do Nos.:	<input type="text" value="RM-TODO"/>
Campaign Nos.:	<input type="text" value="RM-CAMP"/>	Opportunity Nos.:	<input type="text" value="RM-OPP"/>
Segment Nos.:	<input type="text" value="RM-SEG"/>	Assign Same Contact No.:	<input checked="" type="checkbox"/>

Duplicates FastTab

The Duplicates fields indicate how you would like Ceres to research for duplicate Contacts.

Duplicates			
Maintain Dupl. Search Strings:	<input checked="" type="checkbox"/>	Search Hit %:	<input type="text" value="60"/>
Autosearch for Duplicates:	<input checked="" type="checkbox"/>		

Maintain Dupl Search String - A check mark in this field indicates that Ceres automatically updates the search strings it uses to search for duplicate records. You can set up the search strings in the Duplicate Search String Setup Table.

Autosearch for Duplicates - A check mark in this field indicates that you want Ceres to automatically search for duplicates each time a Contact is created or modified. When searching for duplicates, Ceres uses the search strings that you have defined in the Duplicate Search String Setup Table.

Search Hit % - This field contains the level of precision you want the program to apply when searching for duplicates.

E-Mail Logging FastTab

The E-Mail Logging functionality is not supported in Ceres.

E-Mail Logging				
Autodiscovery E-Mail Address:	<input type="text"/>	Queue Folder Path:	<input type="text"/>	...
Email Batch Size:	<input type="text" value="0"/>	Storage Folder Path:	<input type="text"/>	...

Related Topics:

1. Agency Overview
2. Vendor Overview
3. Donor Overview
4. Supplemental Addresses
5. Ship To Addresses
6. Mass Email to Agencies and Shoppers
7. Agency and Donor Emails