contacts — Overview

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Overview

The Contacts area manages people associated with customer, supplier, and other business Accounts. A contact record provides a central reference for the individuals involved in sales jobs, projects, purchasing activity, and ongoing commercial communication.

Sales representatives, account managers, project managers, purchasing officers, warehouse managers, and inventory controllers use Contacts to maintain the people linked to operational and commercial records. Keeping contact information current supports accurate communication across Accounts, sales jobs, buyouts, and Projects.

Contacts may also be associated with supporting files and service-related Tickets, allowing relevant documentation and follow-up activity to remain connected to the appropriate person.

What you can do here

- **Save** changes made to a contact record.
- **Save and Close** the contact record after saving changes.
- **Cancel** pending changes without saving them.
- **Delete** a contact record when it is no longer required.
- **files** access files associated with the contact.
- **Tickets** view or manage Tickets related to the contact.
- **Attach** add an attachment to the contact record.
- **Dashboard**, **Reports**, and **My Desk** open the relevant workspace, reporting, and personal work areas.

Related pages

- contacts
- contacts — Learning Path