Prospect Contacts

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The Contacts form is displayed on the Prospect toolbar once the Prospect form has been saved. The Contacts form is used to create a list of contacts relevant to the Prospect. You may enter as many contact records as needed.
The Contacts form is comprised of data entry fields and function button located at the bottom of the form. These function buttons operate the same as the function buttons on the Prospect form. For definitions of each function button refer to the Prospect Function Buttons topic.

All data entry fields contained on the Contacts form will be described below.

- Name - Clicking the Name button will open the Contact Name form where your will enter the name information for the contact being created or edited.
- Title - Enter the title for the Contact such as homeowner, manager etc. This field is optional.
- Address - Click the address button to enter the address of the Contact. After entering the street address information, tab to the Zip Code field. Enter the Zip Code then press the tab key. The City and State will automatically fill in.
- Email - The email address for the Contact. Entering an email address will make available other functions for the Contact such as sending an email, creating a Vcard or scheduling an appointment through Microsoft Outlook.
- Notes - This is a free-form text field to enter important information related to the Contact. This field has a 256 character limit.
- Phone 1 - The primary telephone number for the Contact.
- Phone 2 - The secondary telephone number for the Contact.
- Mobile - The mobile telephone number for the Contact.
- Pager - The pager telephone number for the Contact.
- Fax - The fax telephone number for the Contact.
- Global Contact - This option is used to flag a contact so that it may be linked to a different Prospect record.