Contact Management Overview

Purpose of this document

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.

> **Note:** If you are hosted by Feeding America, then the email logging functionality may not be supported.

Ceres Object release 5.00.00 is required for the functionality described in this document.
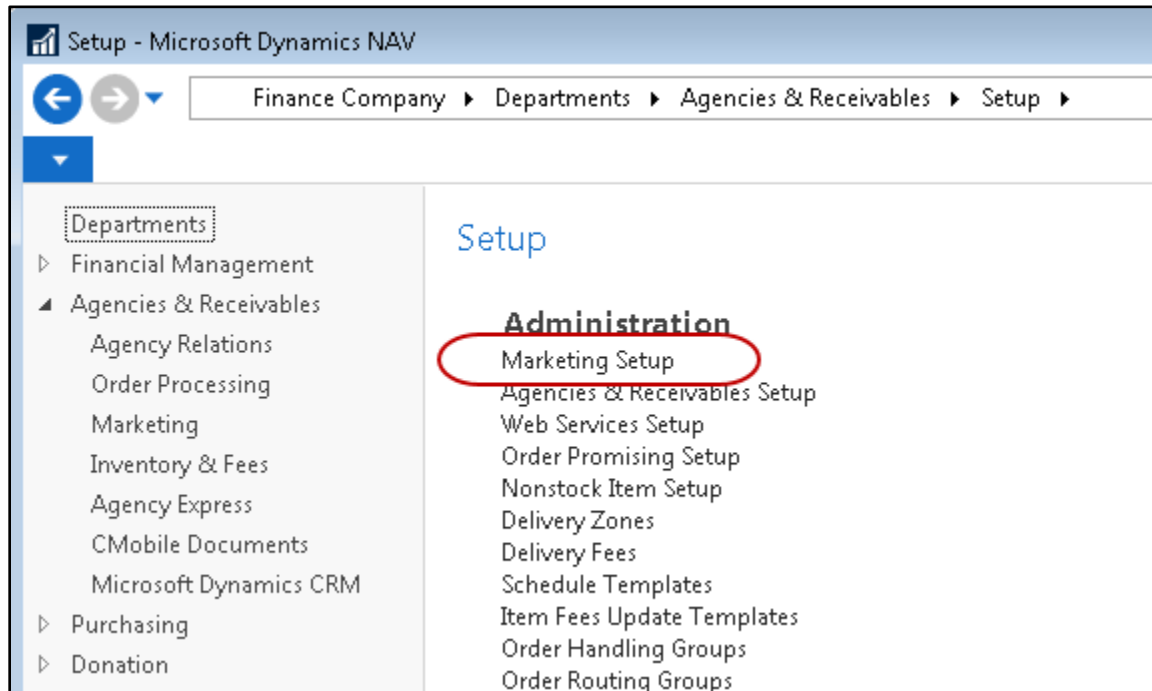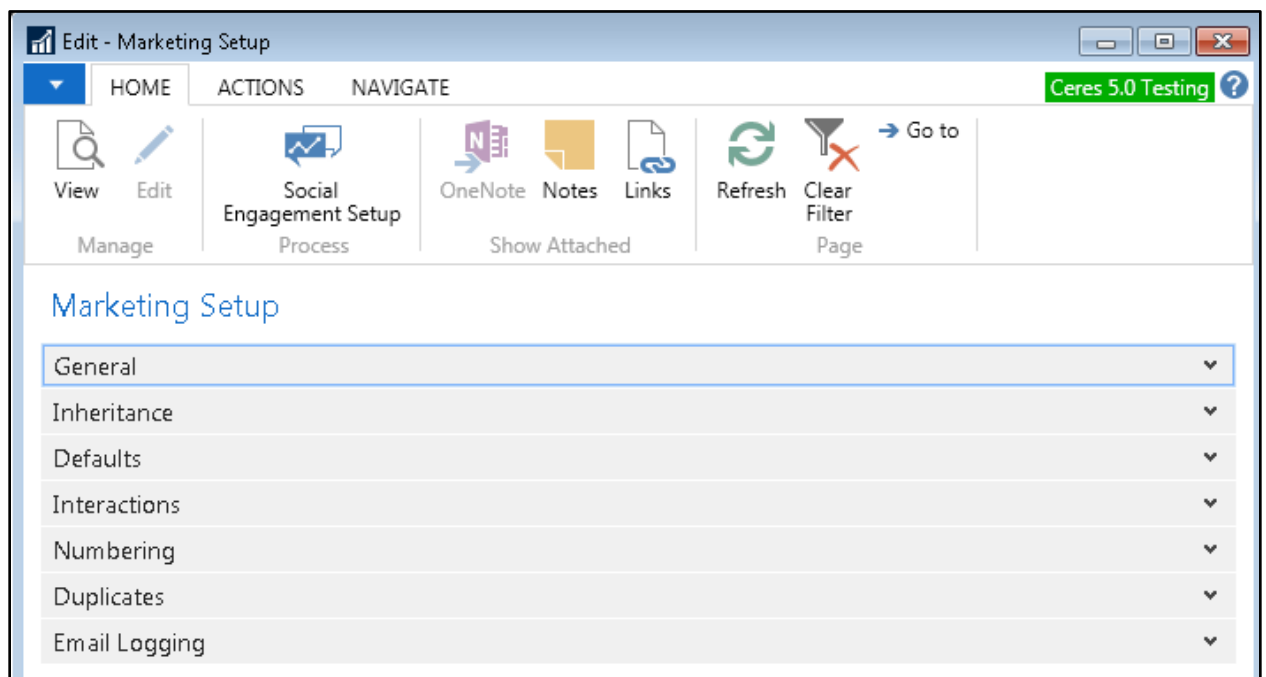
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Marketing Setup

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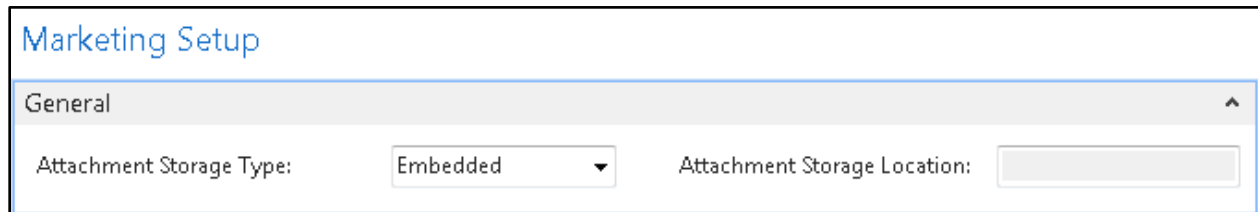

2. Update the setup parameters on each of the FastTabs.

General FastTab

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

Marketing Setup

General

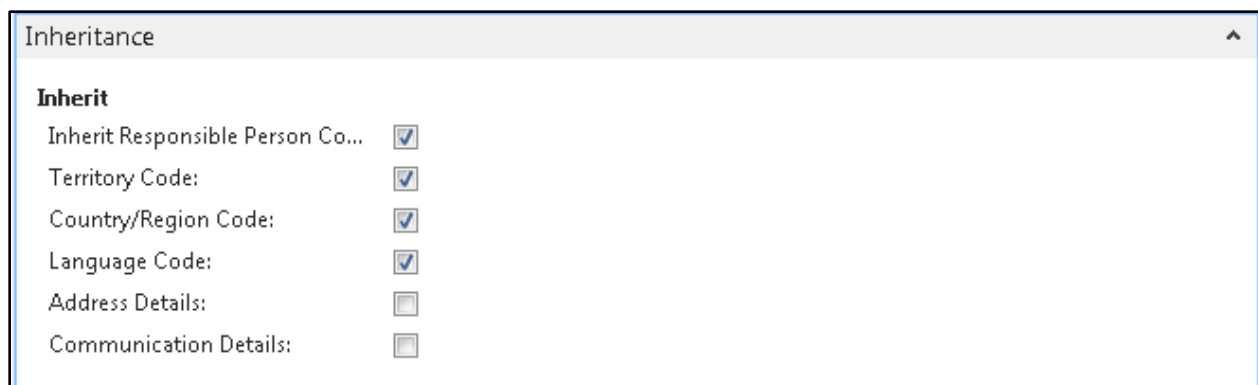Attachment Storage Type: Embedded   Attachment Storage Location:

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

Inherit Responsible Person Co...   ☑
Territory Code: ☑
Country/Region Code: ☑
Language Code: ☑
Address Details: ☐
Communication Details: ☐

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

Interactions FastTab

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

Interactions			^
Mergefield Language ID:		**Bus. Relation Code for**	
		Agencies:	AGENCY
		Vendors:	VENDOR
		Donors:	DONOR
		Shoppers:	SHOPPER
		Bank Accounts:	
		Parent Agencies:	PARENT

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.:	RM-CONT	Task Nos.:	RM-TODO
Campaign Nos.:	RM-CAMP	Opportunity Nos.:	RM-OPP
Segment Nos.:	RM-SEG	Assign Same Contact No.:	✓

Duplicates FastTab

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

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.

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