

Contact Management

SYSPRO 8

Reference Guide

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Contact Management System

Exploring

Where it fits in?

The **Contact Management System** feature lets you manage information related to the individuals and entities involved in your business interactions. This includes SYSPRO customers, suppliers, prospective clients (prospects), leads, consultants, competitors, and even internal colleagues within your organization.

Benefits

- Calendar and contact synchronization
- Effortless email management
- Streamlined and organized communication
- Comprehensive insights into business relationships

Functionality

A holistic 360-degree perspective within the **Contact Management System** and seamless integration with Microsoft Outlook allows you to effortlessly add and update contact details, enhance responsiveness to customer needs, streamline your efforts by eliminating duplication, and boost customer retention. You can record essential details from phone calls and emails, schedule appointments and associate them with specific contacts, set reminders for important dates, and create a to-do list for tasks.

Navigation

The programs related to this feature are accessed from the **Program List** of the SYSPRO menu:

- *Program List > Contact Management*

Terminology

Account (CMS)

Accounts in the **Contact Management System** let you manage your contacts, such as customers and suppliers (existing or potential), leads, colleagues or any other internal or external contact person.

Contacts assigned to prospective accounts can later be converted into customers and suppliers.

Activities (CMS)

Activities in the **Contact Management System** are events that are recorded against your contacts, such as phone calls, emails, meetings and tasks.

Contacts (CMS)

Contacts are the customers, suppliers, and accounts that are connected to the organizations with which you do business.

Contact Management System (CMS)

SYSPRO's **Contact Management System** enables you to store and query information about the people you interact with in the business environment. It assists you in tracking communications, appointments, activities, etc., between the touchpoints of an organization.

Starting

Prerequisites

The following configuration options in SYSPRO may affect processing within this program or feature, including whether certain fields and options are accessible.

To use this feature, the following setup option(s) must be configured:

Setup Options

To use this feature, the following setup option(s) must be enabled:

Setup Options > Preferences > Contact Management > Activities

- Follow up flag captions
- Activity change preferences
- Activity selection criteria
- Attachment settings
- User-defined fields

Setup Options > Preferences > Contact Management > Contacts

- Classification captions
- Property captions
- Copy contact details

Setup Options > Preferences > Contact Management > Defaults

- Defaults
- Calendar
- Purge options

Licensing

To use this feature, the following module(s) must be installed according to the terms of your software license agreement:

- Contact Management System

Deploying

Follow these steps to successfully configure the **Contact Management System**:

1. Use the **Contact Management Setup Wizard** setup wizard to add your existing contact details in SYSPRO to the **Contact Management System**.
2. Once you've successfully run the wizard, define the defaults and preferences within the **Setup Options** program:
 - a. Activity preferences (*Setup Options > Preferences > Contact Management > Activities*)
 - b. Contact preferences (*Setup Options > Preferences > Contact Management > Contacts*)
 - c. Defaults (*Setup Options > Preferences > Contact Management > Defaults*)
3. Specify your own wording for certain fields (*Setup Options > User Defined Fields > Contact Management > Accounts*).
4. Use the **Operator Maintenance** program to select the relevant contact management operator activities.
5. Use the **Generic Browse and Maintenance** program to setup the various classifications used to categorize contacts in the **Contact Management System**.

Security

You can secure this feature by implementing a range of controls against the affected programs. Although not all these controls are applicable to each feature, they include the following:

- You restrict operator access to *activities* within a program using the **Operator Maintenance** program.
- You can restrict operator access to the *fields* within a program (configured using the **Operator Maintenance** program).
- You can restrict operator access to *functions* within a program using passwords (configured using the **Password Definition** program). When defined, the password must be entered before you can access the function.
- You can restrict access to the eSignature *transactions* within a program at operator, group, role or company level (configured using the **Electronic Signature Configuration Setup** program). Electronic Signatures provide security access, transaction logging and event triggering that gives you greater control over your system changes.
- You can restrict operator access to *programs* by assigning them to groups and applying access control against the group (configured using the **Operator Groups** program).
- You can restrict operator access to *programs* by assigning them to roles and applying access control against the role (configured using the **Role Management** program).

Solving

System messages

Warning messages

GeoLocation Error

GeoLocation Error



There was a problem resolving GeoLocations.

The server returned this error:

```
<ERROR> <?xml version="1.0"
encoding="UTF-8"?>
<GeocodeResponse>
<status>ZERO_RESULTS</status>
</GeocodeResponse>
</ERROR>
```

Cause

This message appears after selecting the **Resolve GeoLocation from address** hyperlink within the **Suppliers** program, if either of the following apply:

- The address information entered can't be converted into the corresponding co-ordinates.
- Address information has not been provided.

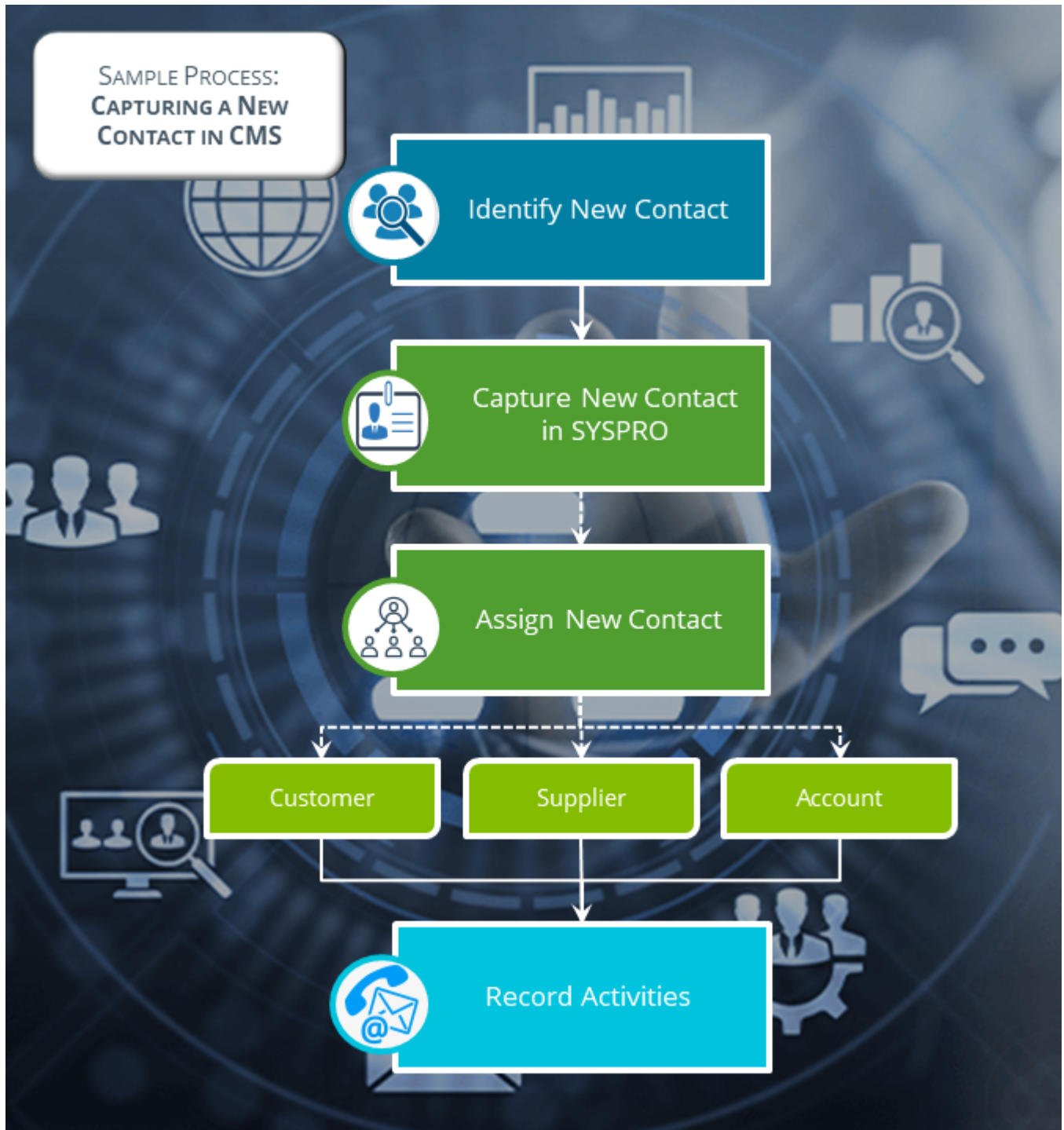
Solution

To populate this field with the correct co-ordinates, ensure that you provide as much information related to the account's physical address as possible.

Using

Process

Creating a new contact



Affected programs

The following indicates areas in the product that may be affected by implementing this feature:

Setup programs

Contact Management Setup Wizard

*This program is accessed from the **SYSPRO** button.*

This program lets you set up the **Contact Management System** using your current SYSPRO data.

Contact Maintenance Preferences

*Accessible when selecting **Preferences** on the toolbar (SYSPRO Web UI (Avanti)) or from the **Options** menu (SYSPRO Desktop) within the **Contacts** program.*

This program lets you configure preferences applicable when maintaining contact information within the **Contacts** program.

Contact Query Preferences

*Accessible when selecting **Preferences** on the toolbar (SYSPRO Web UI (Avanti)) or from the **Options** menu (SYSPRO Desktop) within the **Contact Management Query** programs.*

This program lets you configure options that will determine the level of detail you want to view within the **Contact Management Query** and **Contact Management Query** programs.

Contact Activity Preferences

*Accessible when selecting **Preferences** on the toolbar (SYSPRO Web UI (Avanti)) or from the **Options** menu (SYSPRO Desktop) within the **Activity Search** program.*

This program lets you define your preferences when viewing the activities recorded for contacts in the **Contact Management System**.

Contact Query Preferences

*Accessible when selecting **Preferences** on the toolbar (SYSPRO Web UI (Avanti)) or from the **Options** menu (SYSPRO Desktop) within the **Contact Query** program.*

This program lets you define your preferences when viewing contacts in the **Contact Management System**.

Contact Organization Preferences

*Accessible when selecting **Preferences** on the toolbar (SYSPRO Web UI (Avanti)) or from the **Options** menu (SYSPRO Desktop) within the **Organization Search** program.*

This program lets you define your preferences when viewing organizations in the **Contact Management System**.

Contact Management to Outlook Sync

Program List > Contact Management > Setup

This program lets you synchronize contact details between the **Contact Management System** and Microsoft Outlook.

CMS Generic Browse Maintenance

Contact Management > Setup

This program lets you browse and maintain a list of elements used in the **Contact Management System** (e.g. account types, contact categories, activities, etc.).

Contacts

Program List > Contact Management > Setup > Accounts

This program lets you maintain information about the people (contacts) with whom your organization does business.

Accounts

Contact Management > Setup

This program lets you maintain the accounts within the **Contact Management System**, which provide a mechanism for you to manage your contacts.

Contact Copy Details to Multi Contacts

*Accessible from the **Copy Details** option in the **Edit** menu of the **Contacts** program.*

This program lets you copy the content of selected fields to multiple contacts in order to synchronize details.

Transaction Processing programs

Contact Activity Posting

Program List > Contact Management > Setup > Contact Activity Posting

This program lets you record events or activities performed against contacts, such as phone calls, emails, meetings and tasks.

Period End programs

Contact Management Purge

Program List > Contact Management > Contact Management Purge

This program lets you remove contacts and activities no longer required within the **Contact Management System**.

Report programs

Contact List of Accounts

Program List > Contact Management > Reports

Program List > SYSPRO Reporting Services > Contact Management

This lets you generate a list of accounts currently defined in the **Contact Management System**.

List of Contacts

Program List > Contact Management > Reports

Program List > SYSPRO Reporting Services > Contact Management

This program lets you generate a list of contacts held on file in the **Contact Management System**.

Query programs

Activity Search

Program List > Contact Management

This program lets you view information as a result of a search performed on activities, according to the **Activity Search** preferences defined in the **Contact Query Preferences** program.

Contact Query

SYSPRO Programs > Contact Management

This program lets you view information about the people you engage with in the business world.

Contact Management Query

Program List > Contact Management

This program lets you to view information about the people with whom you do business.

The query provides several views into your contact information, enabling you to see the relationships between organizations (i.e. accounts, customers and suppliers) and the respective contacts for these organizations.

Organization Search

Program List > Contact Management

This program lets you view information about the organizations that you engage with as a business.

Contact Reminders Query

Program List > Contact Management > Contact Reminders Query

This program lets you view details of outstanding reminders created by the **Contact Management System**, so that these can be actioned.

My Organization Query

Program List > Contact Management > My Organization Query

This program lets you view information about the people in your own organization and your own personal activities.

Account Query

Program List > Contact Management

This program lets you view information about the accounts within the **Contact Management System**.

Activity Search

Program List > Contact Management

This program lets you view information as a result of a search performed on activities, according to the **Activity Search** preferences defined in the **Contact Query Preferences** program.

Browse programs

Browse on Contacts

Program List > Contact Management > Browsers > Browse on Contacts

This program lets you view details of people who belong to the organizations with which you conduct business.

Browse on Accounts

Program List > Contact Management > Browsers > Browse on Accounts

This program lets you view details of accounts within the **Contact Management System**.

Contact Activity Type Maintenance

*Accessible when browsing on the **Activity type** field within the **Contact Activity Posting** program.*

This program lets you view details of accounts within the **Contact Management System**.

Contact Organization Management

*Accessible when browsing on the **Contact** field of the **Contact Details** pane within the **Suppliers** program.*

This program lets you maintain the links between organizations (i.e. customers, suppliers and accounts) and contacts within the **Contact Management System**.



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