Overview of Contacts

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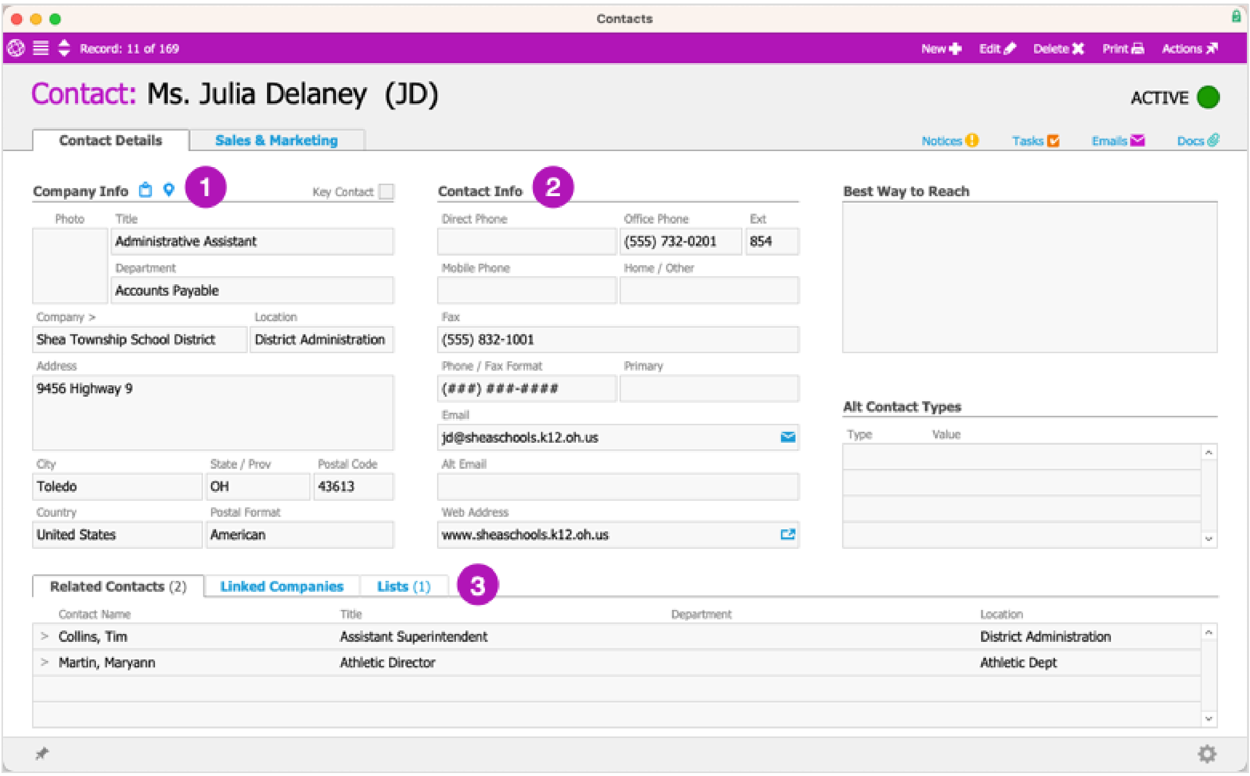
This guide provides a brief overview of features available in the Contacts module. It is intended for general users.

Contact records represent individuals that you work with throughout your business transactions. These individuals can be customer and vendor companies, potential leads, and even internal team members.

The Contacts module allows you to easily view and manage all pending, active, and inactive contact records. Additionally, you can create new contact records from this module. To access the Contacts module, navigate from Main Menu > CRM & Sales > Contacts.

Contact Details Tab

The Contact Details tab tracks information related to the contact's company, preferred contact methods, and certain related records.



1. Company Info

You can enter information about the contact in relation to their respective company, including their title, department, company record, and company address.

You can mark the Key Contact flag to specify this contact as the primary contact. When a record that includes a contact is created, the primary contact will be auto-selected.

2. Contact Info

The Contact Info section holds details about how to reach the contact, including their phone and fax information, email address, and web address. You can edit the Phone / Fax Format field to change the default formats for phone and fax numbers.

Best Way to Reach

You can note the preferred contact method in the Best Way to Reach text field.

Alt Contact Types

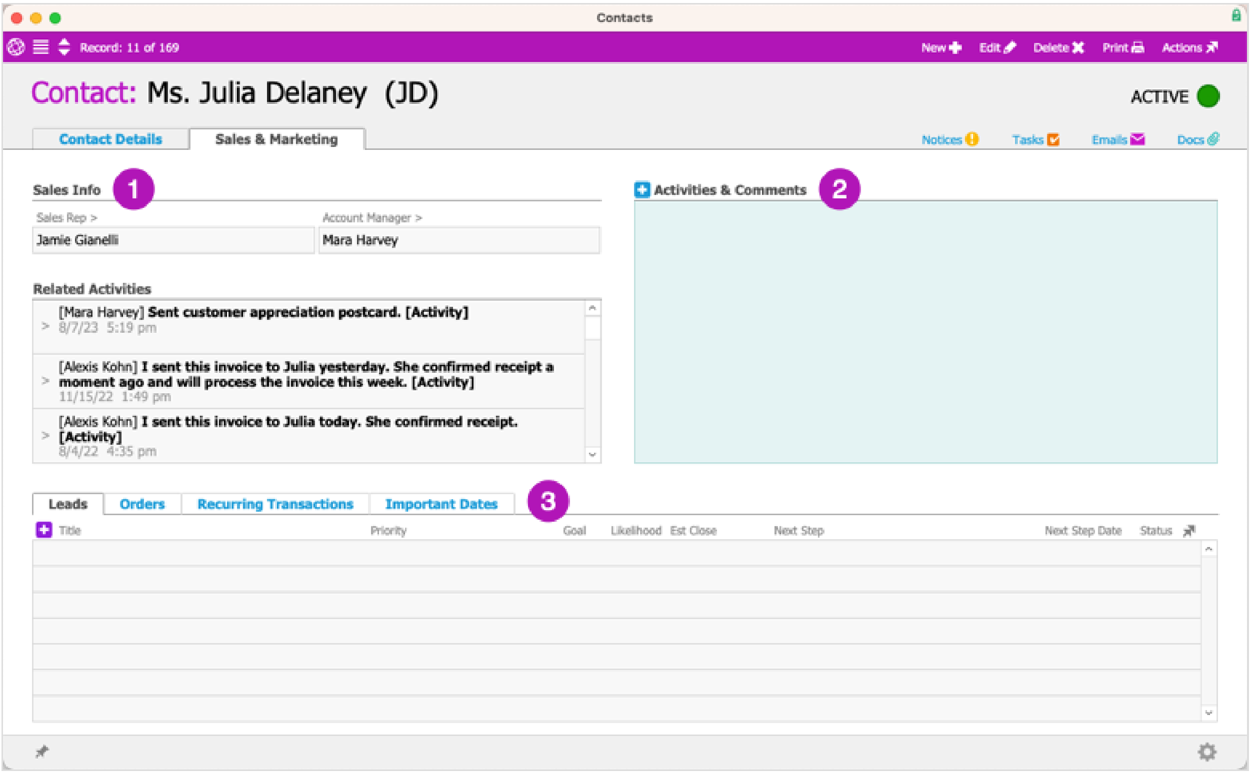
In the Alt Contact Types section, you can list any alternative contact methods.

3. Additional Portals

These tabs track and provide links to other contacts, companies (https://aace6.knowledgeowl.com/help/overview-of-companies), and lists (https://aace6.knowledgeowl.com/help/overview-of-the-lists-module) that are related to this particular contact.

Sales & Marketing Tab

From the Sales & Marketing tab, you can view the internal team members in charge of sales for this particular contact, various sales activities, and additional related records.



1. Sales Info

aACE stores additional sales information for the contact. Team members that are related to the contact, such as a sales representative or account manager, are listed here.

The Sales Info section also holds Related Activities. Any activities added to records linked to the contact record appear under Related Activities. aACE also provides a Go-To button (>) to the record the activity was entered on. Related activities listed here include the time, date, and team member.

2. Activities & Comments

The Activities and Comments section differs from Related Activities. Activities and Comments is a collection of [activities and comments](https://aace6.knowledgeowl.com/help/adding-activities-support-or-next-steps) (https://aace6.knowledgeowl.com/help/adding-activities-support-or-next-steps) added to the contact record specifically; Related Activities collects activities from other system records.

It is important to note that activities entered at the company record's Activities and Comments section will appear in the Related Activities section. However, entries in the Related Activities section will not appear in the Activities and Comments section.

You can add a new activity or comment to the company record by clicking the Add icon ( ).

3. Related Leads, Orders, Recurring Transactions, & Important Dates

These tabs track and provide links to leads, orders (https://aace6.knowledgeowl.com/help/overview-of-orders), recurring transactions (https://aace6.knowledgeowl.com/help/working-with-recurring-transactions), and important dates related to this particular contact.

The Important Dates tab is used to keep track of noteworthy dates relating to the company. aACE can send notices to you and your team members when the important date arrives. You can learn more about the Important Dates feature by reading our feature highlight (https://aacesoft.com/never-miss-an-important-date-with-aace/).