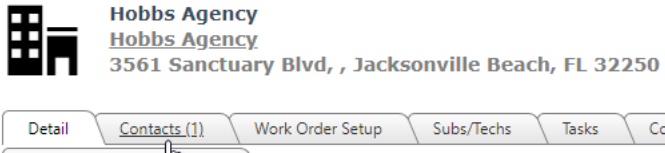


Company Contacts – How to Add

To Add a Contact to after a new Company is created single click the Contacts tab.

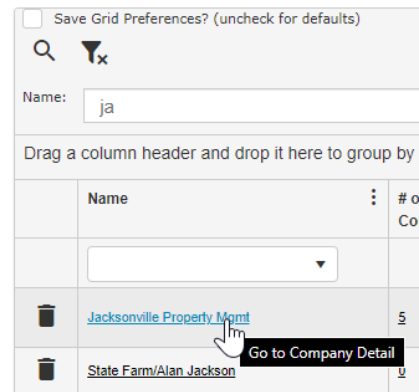


To add a Contact to an existing Company, search the Company using your preferred search.

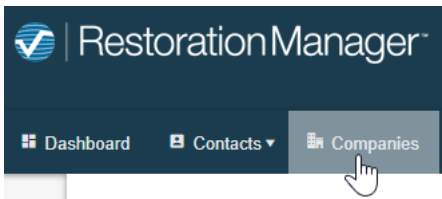
Option 1: From the **Search** located to the top right of the page select Company Name from the drop-down. Begin typing in the Company Name select your enter key or the magnifying glass to complete the search. The less you type in the more results you will return. Single click the Company Name the contact will be added to.



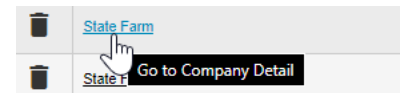
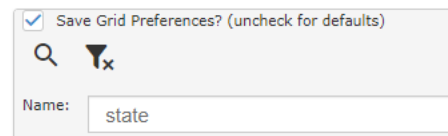
View Companies



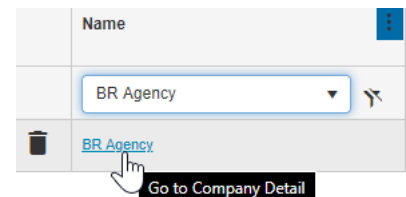
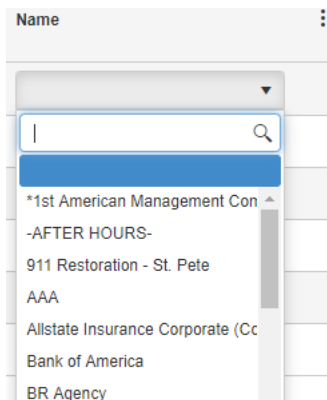
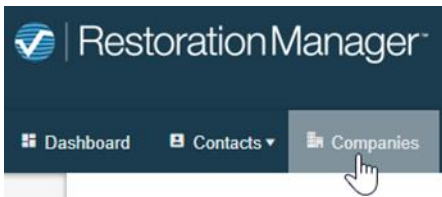
Option 2: Single click on **Companies** in the toolbar, next search within the **Name** search field select your enter key or the magnifying glass to complete the search. The less you type in the more results you will return. Single click the Company Name the contact will be added to.



View Companies



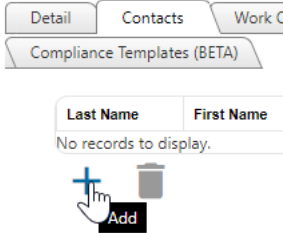
Option 3: Single click on **Companies** in the toolbar, next search for the Company from the **Name** drop-down menu once you make the selection single click the Company Name the contact will be added to.





Company Contacts – How to Add

To add the Contact, click the + Add icon located to the bottom left of the page.



Within the **Company Detail** page, add the following (if applicable):

- Primary Contact:** Check the box to mark the contact as the Primary this is **ONLY * required** if this is the first contact that is being added to the Company record.
- Secondary Contact:** optional
- My Contact:** Check the box if you would like to add this individual to your contact list. This is not a searchable field.
- Search Name:** Begin to search the contact, the purpose of this is to ensure the contact is not already existing against the record. The less you type in the more results are returned, this is beneficial if the name is not spelt the way you thought. If the contact doesn't display click enter and the First and Last Name of the Contact will add to the fields.
- Title:** Select the Title of the contact from the drop down. Example: Adjuster, Agent, Property Manager, etc.
Note: The Administrator of the application can add Titles by going to Settings→ System Setup→ Settings→ other Settings, Titles/Positions
- Use Same Address as Company:** Check this box if the contact is located at the same address as the Company.
- Use Same Address as Territory:** Check this box if the contact is located at the same address as the Territory.
- Address:** Apply the Address where the contact is located.
- City, State, and Zip:** Apply the City, State, and Zip where the contact is located.
- Country:** Optional, Add the County where the Contact is located.
- Email Address:** Apply the Contacts email address.
- Username:** Assign a username this will be needed so this contact can access the Company Portal (if applicable).
- Password:** Assign a password this will be needed so this contact can access the Company Portal (if applicable).
- Phone 1-5:** Apply the contact number(s) for the contact; select the type drop down next to the number.
- SMS/Text:** Select the Country Code from the drop-down. Enter the Contacts cell number no spaces, dashes, etc.
- Birthday, Anniversary, Married/Kids, etc.:** Contact Custom fields is an area additional information about the contact can be applied (if applicable).

Note: The Administrator of the application set the field descriptions up by going to Settings→ Office Setup→ Terminology, next go to the Settings Tab→ and select the number of Company Contact custom fields to display (1-6).

General Information

Primary Contact Secondary Contact My Contact

Search Name:

First: MI: Last:

Title:

Use Same Address as Company Use Same Address as Territory

Address:

City: State: Zip:

Country:

Email Address:

Username:

Password:

Strength: No Password Entered

Phone 1:

Phone 2:

Phone 3:

Phone 4:

Phone 5:

SMS/Text:

Birthday:

Married/Kids:

Anniversary:

Hobbies:

Other Info:

Previous Comp.:

Notes:

Site: All Offices


Company Contacts – How to Add

17. Notes: Apply additional Company details/information (if applicable)

IMPORTANT: Notes applied in this field will appear within the Job Additional Contacts Tab in the Notes column. They will also print on the Job Preliminary Report.

Job → Additional Contacts

Detail	Job Contacts (1)	Additional Contacts (1)	Losses (1)	Schedules (2)	Tasks (4)	Subs/Techs	Financials**	Correspondence (10)
Documents & Pics (1)	Document Merge	Inspections	Moisture Readings	Equipment	Change Log	Create WOs		

Additional Contacts:
 Reported By:
 Referred By: 

Contact Type	Name	Company	Title	Phone	Email	Notes
Source of Referral	Hunter Jaxson	Jacksonville Property Mgmt	Property Manager	904-000-1111 - Cell	dbryant@verisk.com	Company Contact Notes Field

Job → Preliminary Report

Additional Contacts

Referred By: Property Manager


Source of Referral: Hunter Jaxson, Property Manager - Jacksonville Property Mgmt 904-000-1111 - Cell dbryant@verisk.com

Notes: Company Contact Notes Field

Contact Sales Information

- Marketing Rep:** Select the Marketing Rep from the drop down that is building the report/relationship with the contact.
Note: Check More Marketing Reps located above the Marketing Rep field to apply additional Marketing Reps that are also have a report/relationship with the contact.
- Territory:** Select the Territory from the drop-down (if applicable)
Note: The Administrator of the application can add Territories by going to Settings→ System Setup→ Company Settings, Territories

Sales Information



More Marketing Reps

Marketing Rep:

Territory:

Marketing Categories

Drag & drop or select & move the Marketing Categories from the left, over to the right side to add them to the contact. These may be interests, associations, etc.

Note: The Administrator of the application can add Marketing Categories by going to Settings→ System Setup→ Settings→ Other Settings, Marketing Categories

Marketing Categories

Drag & drop or select & move Marketing Categories from the left, over to the right side to add them to the contact.

Associations	▶		
CE Class - 2019	◀		
Church	▶▶		
Priority Response	◀◀		
Mailing List			
Sports TEAM			

Once you're finished with adding the information to the Contact record click the **Save icon (floppy disc)**.