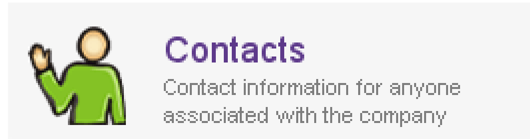
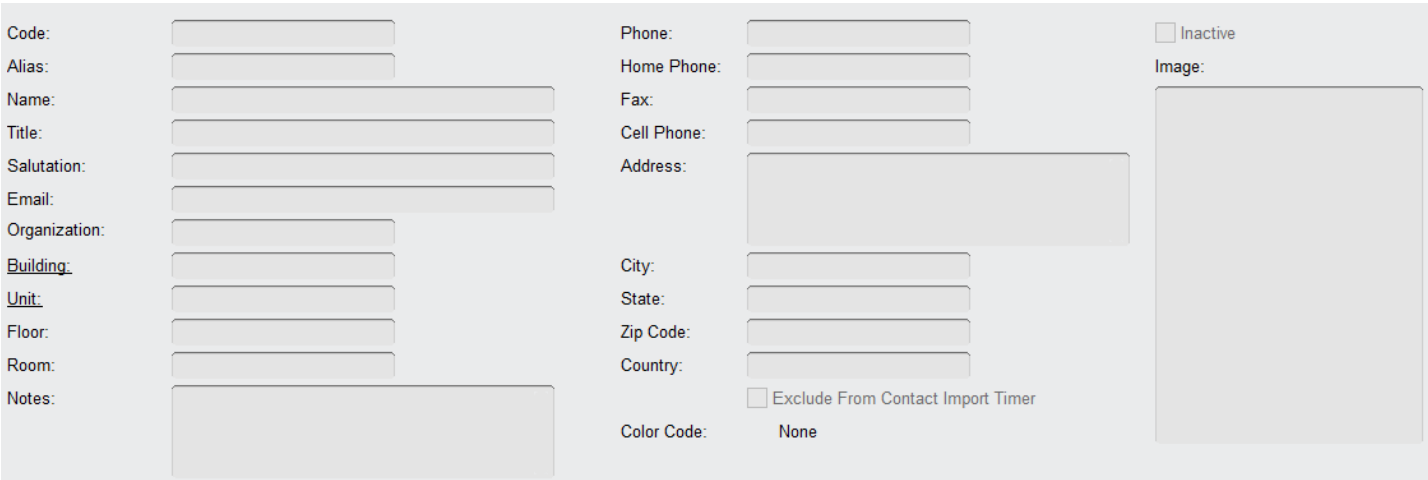
The Contacts capsule stores information about the people that your company is involved with. There is no limit to the number of contacts you can create. The capsule can include contacts related to Clients, Staff, and Vendors. They are used throughout the AwareManager whenever a person is referenced.





Contacts are associated with the following functions in the AwareManager:

- Contact Groups, to identify the members of the groups.
- Work, to identify for whom the work is being performed.
- Purchases, to identify the person for whom the purchase is made, or who the vendor contact is.
- Insurance Certificates, to identify who is responsible for the insurance.
- Correspondence, to determine the addressee of the letter, and to create Contact Groups.
- Email, to determine who Emails will be sent to, and received from
- Visitors, to reference the stored Contact and default their Image on new records

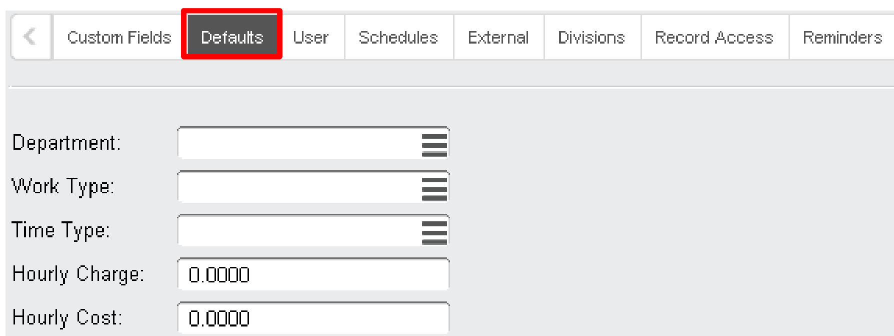
The Contact capsule also stores information about the people who are involved with the management and operation of your company (**Staff Contacts**). You should create contact records for all persons who will be users of the system and all persons who will be assigned Work and/or enter Time.

Staff Contacts are associated with the following functions in the AwareManager:

- Contact Groups, to identify the members of the groups.
- Work, to identify the staff member performing the work.
- Maintenance, to identify the staff member performing the work.
- Time, to identify the staff member the time is associated with.
- Projects, to identify which staff members are associated with the project.
- Purchases, to identify the staff member associated with the purchase and the approver of the purchase.
- Emails, to identify the person sending or receiving emails
- Reminders, to identify the staff member associated with the reminder.

Contact Tabs

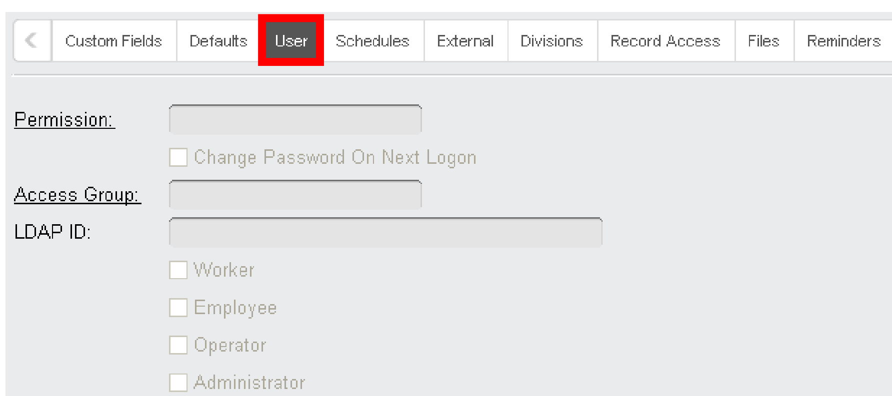
The **Defaults** tab gives you the ability to define some of the settings specific to each Contact. These are the settings that will auto-populate into the records linked to your contact (specifically during entry of *Work*, *Time*, and *Maintenance*).



You can identify each contact's default *Department, Work Type, Time Type, Hourly Charge,* and *Hourly Cost.* Typically these defaults only apply to Staff Contacts.

Note: Defaults can always be changed on individual records linked to the contact.

The **User** tab in the Contact capsule is used to identify the contact as a staff member.



The **Permission** field is used to identify the access level for the contact. The **LDAP ID** field is used to record the corresponding value for the contact in other databases. This field will be used in the AwareManager Portal to facilitate single sign on.

A user's **Access Group** determines which records they can see. Access Groups can limit the search results in each capsule based on multiple factors (for instance, only allowing a tenant user to see Work records associated with their organization).

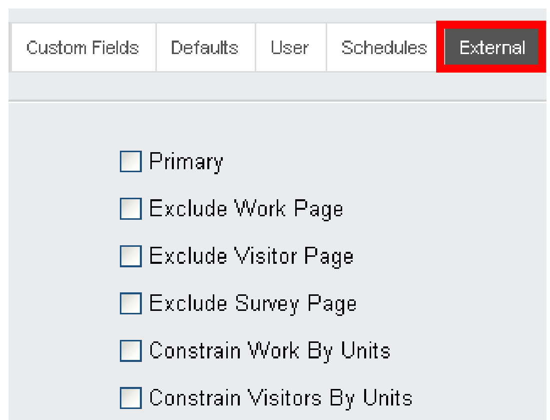
The checkboxes in the User tab identify the following categorizations for the contact:

- **Worker** - a contact that will be assigned work records
- **Employee** - a contact that will enter time
- **Operator** - a contact that will sign into the AwareManager and use the system
- **Administrator** – a contact that is an AwareManager system administrator (they will see notices regarding system registration when applicable)

The **Change Password On Next Logon** checkbox is useful for new users that have been assigned a temporary generic password for first login. When checked, this will require the user to set a new password upon logging into the system.

The **External** tab gives you the ability to set preferences related to AwareManager's Portal Pages and Mobile applications.

The portal page checkboxes allow you to identify the following settings for the contact related to the AwareManager Web Portal Pages Version 270 or earlier. **These settings do not apply in Version 1.14**:



- **Primary** – a contact that will see not only the work and visitor requests that they have entered, but also all those entered by their organization.
- **Exclude Work Page** – a contact that is restricted from viewing/entering Work requests.
- **Exclude Schedule Page** – a contact that is restricted from viewing/entering Schedule requests.
- **Exclude Survey Page** – a contact that is restricted from entering Survey results.
- **Constrain Work By Units** – a contact that has its work list constrained based on which Unit they are located in.
- **Constrain Schedules By Units** – a contact that has its schedule list constrained based on which Unit they are located in.

There are also two text fields located under the External tab: **Web Text** and **Mobile Text.**

- **Web Text** – filling this out will cause the contact to appear in Assigned To and Work Person lists in the Portal.
- **Mobile Text** – filling this out will cause the contact to appear in Assigned To and Work Person lists on the AwareManager Android and iOS mobile applications.

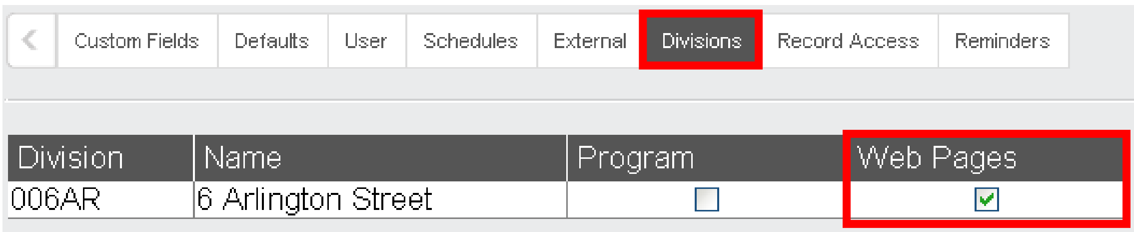
Note: The text input in these fields will determine how the contact appears. For example, if you enter "JDoe" in the Mobile Text field in John Doe's contact record, he will appear as JDoe in lists on mobile apps.

Divisions

The **Divisions** tab in the Contact capsule is used to define which Division(s) the Staff Contact can work in and which division Client contacts can access via the AwareManager Web Portal pages (pre-version 2.0).

Note: This tab will only appear if your database uses Divisions.

A contact can be associated with a single division or multiple divisions. If no divisions are listed, then the contact is considered Global and will be able to view all Divisions. Contacts related to vendors do not need to be associated with divisions (unless you want to give them access to the program).



This is also where you define if the Client contact has access to the **AwareManager Portal Pages**.

The current user cannot modify the Divisions tab of their Contact record by un-checking the *Program* checkbox or deleting the detail line for the active Division. (This prevents them from turning of their access to the division they are currently in.)

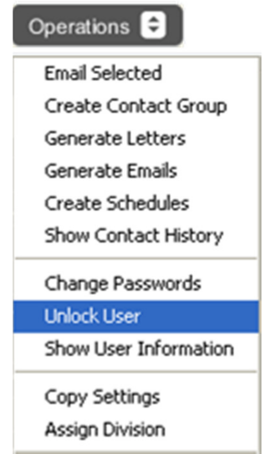
Record Access

This tab allows you to further constrain access within the main AwareManager jxt program for a Contact set up as a user. On a capsule-by-capsule basis, you can define the subset of records the user should have access to. Enter a new detail line for each subset of data, indicating:

- *Capsule* – the capsule you wish to limit access to
- *Field Name* – the field you want to use to define the subset of records
- *Begin Range* – the first record in the range you want to give access to
- *End Range* – the last record in the range you want to give access to

E.g. To limit a user to only being able to see Work at a status of OPEN, you could enter the line:
Capsule = Work
Field Name = Work Status
Begin Range = OPEN
End Range = OPEN

Contacts Operations

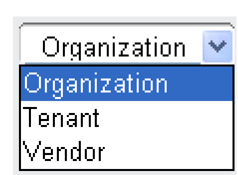


- **Email Selected** – this operation will create an email for all selected contact records in the list.
- **Create Contact Group** – this operation will create a Contact Group record containing the selected contacts in the list.
- **Generate Letters** – this operation will create a letter for a single Contact or a group of Contacts (for complete details please view our Communication documentation).
- **Generate Emails** – this operation will create an email for a single Contact or a group of Contacts (for complete details please view our Communication documentation).
- **Create Schedules** – this operation will allow you to create a schedule record for multiple contacts in the list.
- **Show Contact History** – this operation will display the Work records for a contact. The operation can only be executed for one contact at a time.
- **Change Passwords** – this operation allows the current user to change the passwords for the selected contacts.
- **Unlock User** – this operation allows a password administrator to unlock an account that has been locked out of the system due to too many failed logon attempts.
- **Show User Information** – this operation generates a report that shows a contact's number of failed logon attempts, current account status (locked or unlocked), and the date of their last password change.
- **Copy (Capsule, Search, and User and Favorites) Settings** – these operations copy a selected contact record's setting to all other contacts in the list.
- **Assign Division** – this operation will load the division for the selected contact.

Contact details for defaulting values throughout the program

If you take the time to enter your Contacts completely and correctly (Property, Unit, Address, Telephone, Fax, Email Address, etc.) it will benefit you as this information will default in various places throughout the program.

Many of the fields in the Contact capsule are used to default values in other parts of the program. For instance the Organization, Property, Unit, Floor, Room, Phone fields all default onto Work and Purchase records.

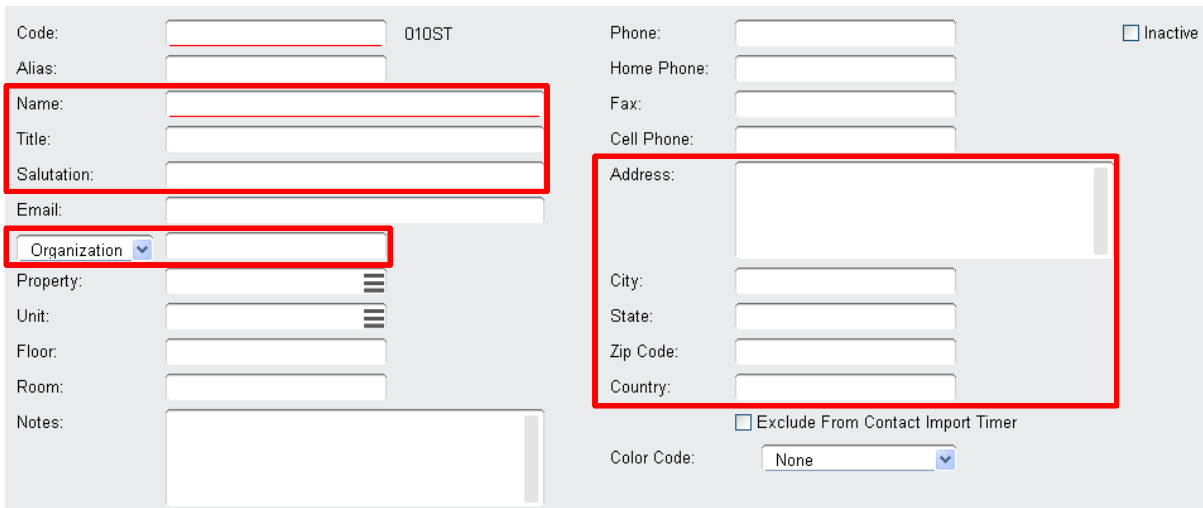


The Organization field is a combo box which is used to associate the person to the entity that they are related to. Most often this is linked to a record in the Client (Tenant) capsule. It can however

also be used to link to a value in the Vendor capsule. The first option “Organization” is a free form text field which can be used to identify an entity that does not exist in the Client or Vendor capsule.
These key fields also default values when using the AwareManager Portal.

Generating Letters

There are several fields within the Contacts capsule that need to be utilized properly in order for the Generate Letters operation to function the most effectively.



Let’s review these key fields:

- **Name** - this will appear as the first line of the address section of all correspondence.
- **Title -** this will appear, under the name in the address section of all correspondence.
- **Salutation -** this will be the salutation that appears on all correspondence created for this contact. When entering values into this field, you should include: an appropriate greeting (e.g. Dear, To, Attn), name (e.g. John, Jonathan, Buddy), and preferred punctuation (e.g. , :, or ;). If this field is left blank, the AwareManager will automatically default “Dear” and then the contents of the *Name* field and a “,”.
- **Organization/Client (Tenant)/Vendor -** this represents the entity that the contact is associated with. The combo box is used to link the contact to an Organization, Client, or Vendor.
- **Address, City, State, Zip -** these fields store the contact’s address information. These fields are used to address the letters in the Generate Letters operation. They will appear at the top of all correspondence. When entering a new contact, if the contact is linked to an organization, client or vendor, these values will default based on the address in the linked record. You can change any of the defaults.

The top of the letter will appear as:

Dan Digger
Owner
Build It Up Construction
20 Fayette St.
Beverly, MA 09102

Note: Be careful when entering in addresses. Make sure there are no extra lines within the Address field – if there are then the address will print with an extra line between the Address information and the City, State, and Zip.

Sending Email

The Email capsule and the Generate Email operation can be used to create correspondence (emails). Emails can be sent to an email address, a single contact in your Contacts capsule, to a group of contacts based upon predefined Contact Groups, or to a group of contacts based on selected items in a list.

Email field

The email field on a contact record stores the contact's email address. This address will be used for any emailed correspondence.