evo-auction

Contact Card

User guide

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BCN

TABLE OF CONTENTS

1.1 CONTACT CARD

CONTACT SEARCH

Contact Search is the master database storing details of all the buyers, the sellers or any other entity involved in buying/selling or marketing processes.

A vendor/buyer must be created as a contact, and then a vendor/buyer template is used to create a vendor/buyer from the contact. This sequence is maintained, because the contact card is key for marketing and other CRM functions.

Information on a contact card and related vendor/buyer card are synchronised. Any changes to mutual fields, such as name and address or phone number, made on one of these cards are replicated on the other. In this way, Evo-auction only maintains one set of communication data.

To access the **Contact Search**:

1. Navigate to your **Role Center,** and then select **Contact Search** from the Ribbon. Alternatively, in the Search box enter **Contact Search**, and then choose the related link.
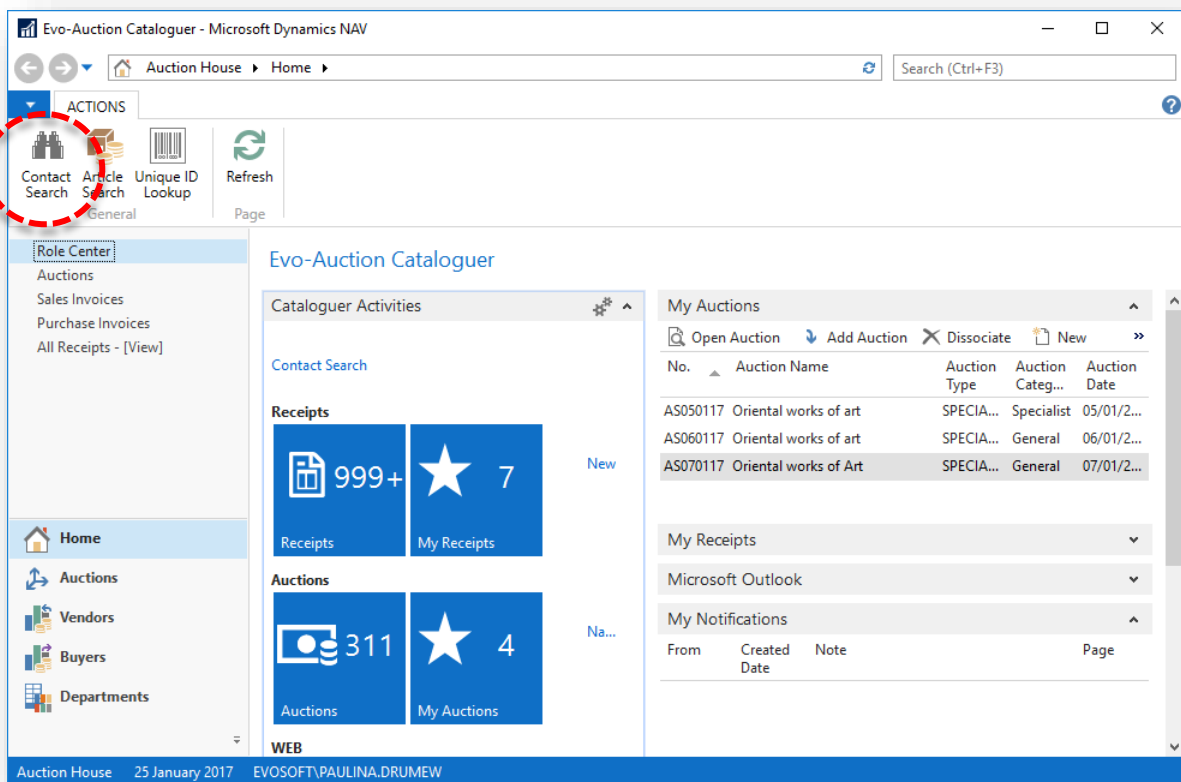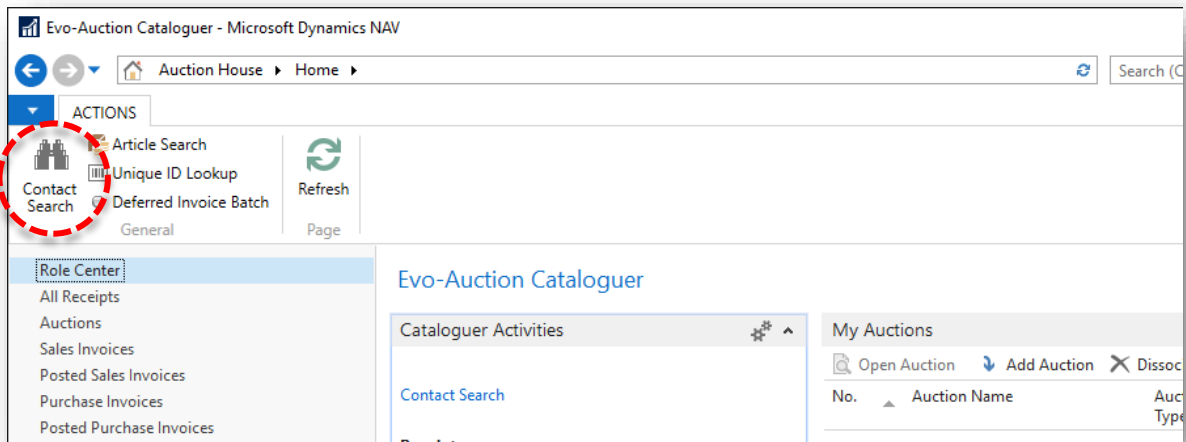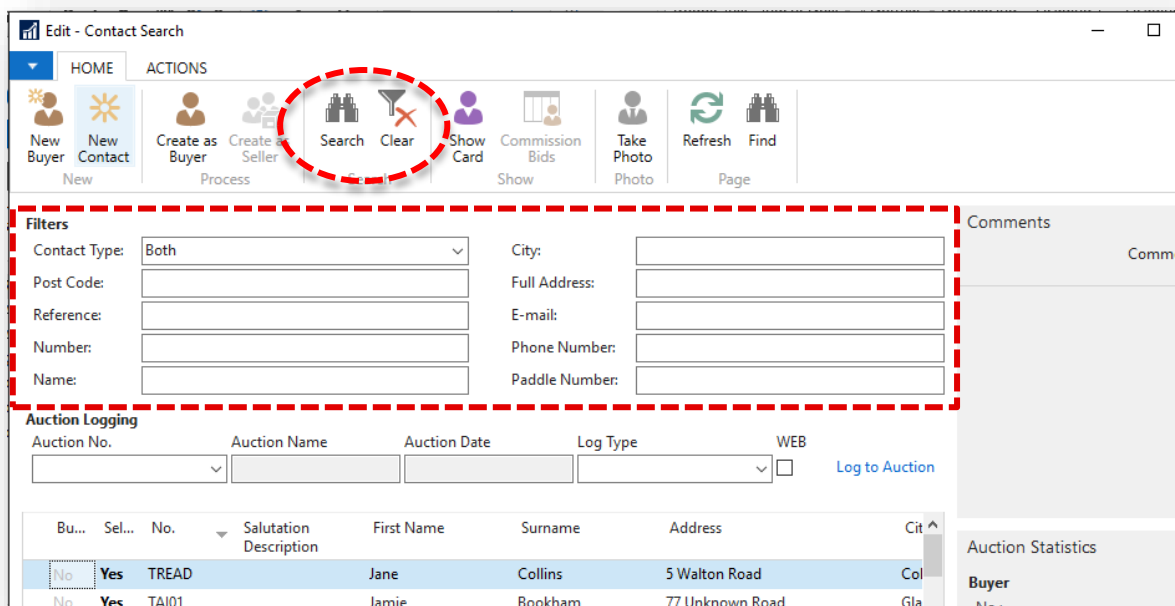
REGISTER NEW CONTACT

Before you register new contact, it is a good practice to check if person/company already exist on the system to avoid duplication.

To check if a contact already exist:

1. Navigate to the **Contact Search** page.

2. To search for a contact, go to the **Filters** pane. You can search by filling in any information such as telephone number, postcode, surname and so on.

3. Select **Search** from the Ribbon.
   To cancel search/filter and bring all the contacts list back, select **Clear** from the Ribbon.

NOTE

If a contact is registered as a buyer, you will see **Yes** in the **Buyer** column.

If a contact is registered as a vendor, you will see **Yes** in the **Seller** column.

If a contact is registered as a vendor and a buyer, you will see **Yes** in both columns.

Buyer	Seller	No.	Salutation Description	First Name	Surname	Ad
No	No	C0004888		Sdda		
Yes	Yes	C0004886	Ms	Monika	Fakhoury	12
No	No	C0004885	Mr	John	Smith	31
Yes	No	C0004883	Miss	Anna	Streeter	1 P
Yes	Yes	C0004882	Miss	Pauline	Duncan	4 N
Yes	Yes	C0004881	Mr	Edward	Corn	8 N
Yes	No	C0004880	Mr	Mark	Proctor	7A

If the contact not found, create new **Contact Card**.

To create/register new **Contact Card:**

1. Navigate to the **Contact Search** page and then select **New Contact** from the Ribbon.

The **Contact Card** window opens.

Some fields are optional, so you need to refer to your company's internal procedures to determine what information is required at input stage.
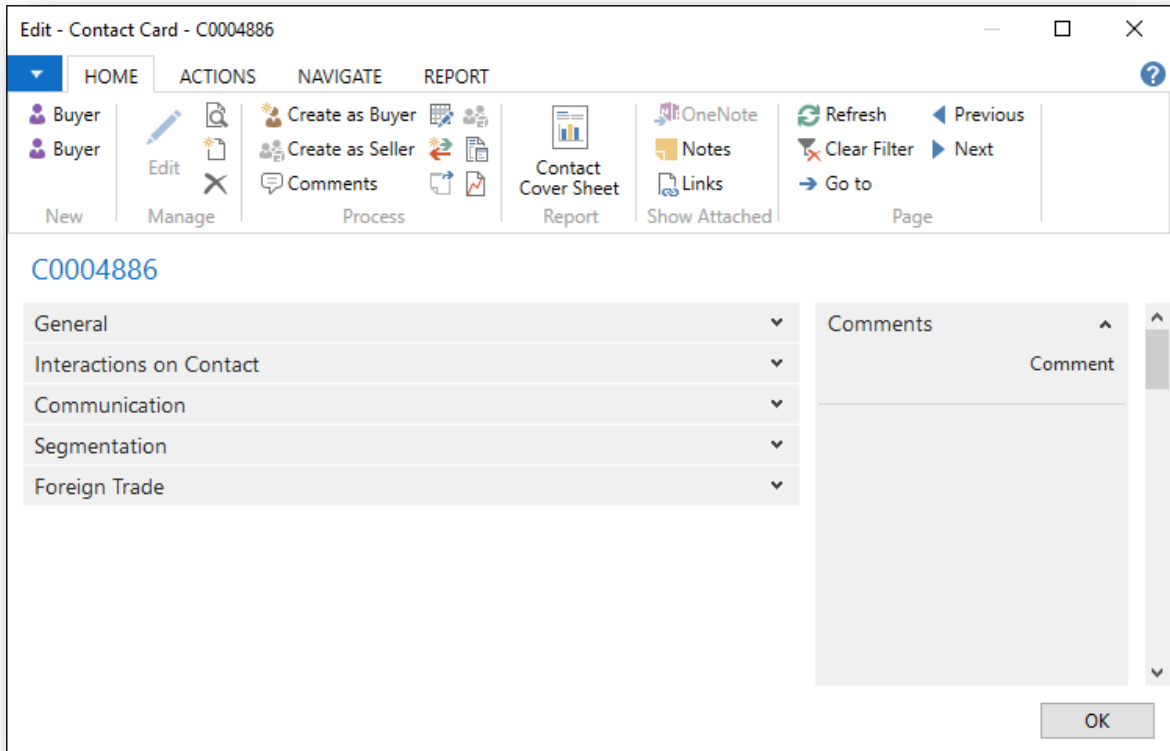
GENERAL FASTTAB

Complete the **General FastTab** on the contact card.

Field name	Type	Description
No.	Unique ID	The contact number is a unique number, usually allocated from a number series.
Name		Enter full contact name.
Name Details		Populated from the **Name** field.
Address		Enter address details.
City	Auto recognition	To use auto recognition, you must fill in the **Postcode** field first.
County	Auto recognition	To use auto recognition, you must fill in the **Postcode** field first.
Post Code	Lookup	Enter Postcode
Country/Region Code	Lookup	Do not populate this filed if your home country, otherwise select a country or start typing to bring country name.
Phone No.		Enter telephone number.
Mobile Phone No.		Enter mobile number.
E-Mail		Enter valid email address.
Blocked	Dropdown	Synchronised with related Buyer Card. To block the contact, select from available options: • Invoice • All – Contact is blocked on the system for any actions • Advisory • Deceased • Duplicate – select this option if Contact is duplicated
Permanent Paddle No.		Use this box to assign a permanent paddle number. Buyer Card must exist to use this field.

INTERACTIONS ON CONTACT FASTTAB

In this FastTab, you can view all registered interactions for the contact.

Most common interaction is an auction registration.

COMMUNICATION FASTTAB

Complete all fields where information is known, if not already dynamically completed. The fields are self-explanatory.

Field name	Type	Description
Salesperson Code	Lookup	Select a Salesperson from the list. Synchronised with the Communication FastTab on related buyer card.
Phone No.	Auto	Synchronized with the General FastTab.
Home Page		Enter contacts website address.
Language Code	Lookup	Language code is only needed if you are producing foreign language documents. Select a code to apply translation. Synchronised with the Foreign Trade FastTab on related vendor card.
Salutation Code	Auto	Synchronized with the General FastTab.
Correspondence Type	Dropdown	Select preferred correspondence type.

SEGMENTATION FASTTAB

In this FastTab, you can view mailing groups the contact is assigned to.

Field name	Type	Description
How did you hear about us		Marketing tool. Populated from related buyer or vendor card.
No. of Mailing Groups	Flowfield	Number of mailing groups the contact is assign to. Click on the number to view all the groups or to add contact to another group.
No. of Industry Groups	Flowfield	Number of industry groups the contact is assign to. Click on the number to view all the groups. This field is use to tag contact, for example as an Exhibition attendant or member of Gardening Club.
Exclude from Segment	Tickbox	If selected, the customer is excluded from marketing campaigns.

FOREIGN TRADE FASTTAB

This FastTab is in use only if contact is foreign to produce invoices if different currency. Synchronised with the Foreign Trade FastTab on related vendor card and buyer card.

Field name	Type	Description
Currency Code	Lookup	Always fill out the currency if you are not using local currency.
VAT Registration No.		Populated from the Foreign Trade FastTab on related vendor card.

Select **OK** to save and close the contact card.

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