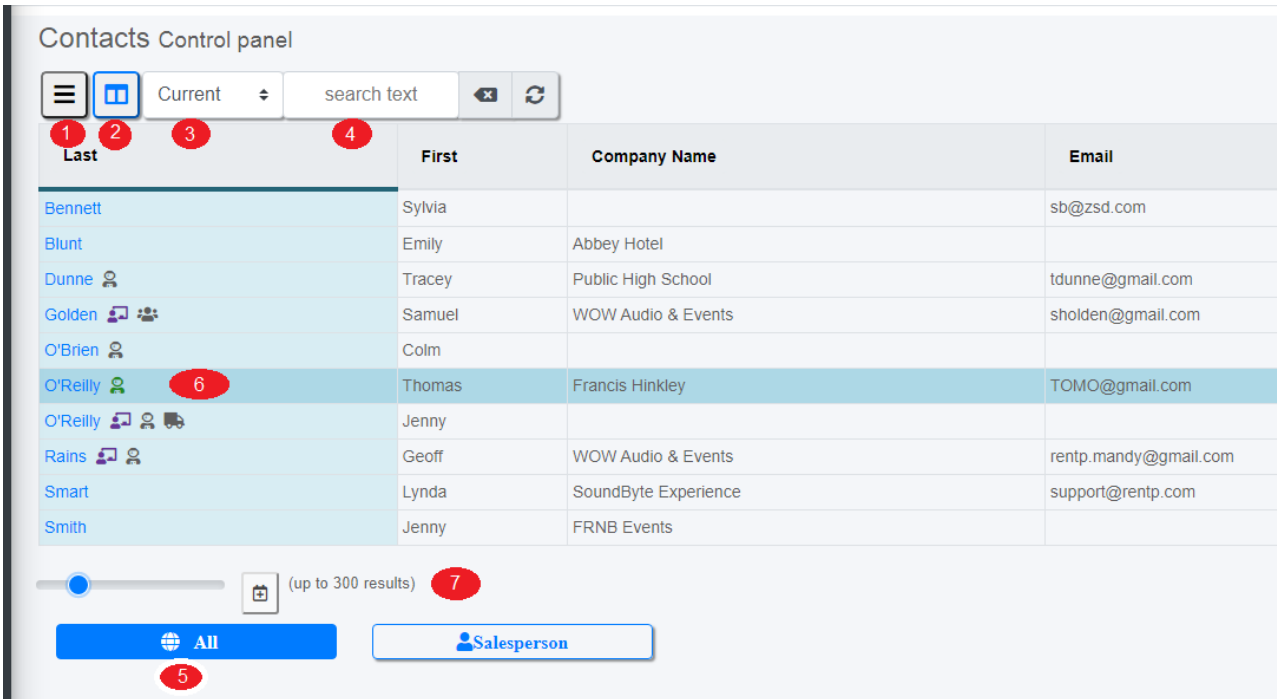


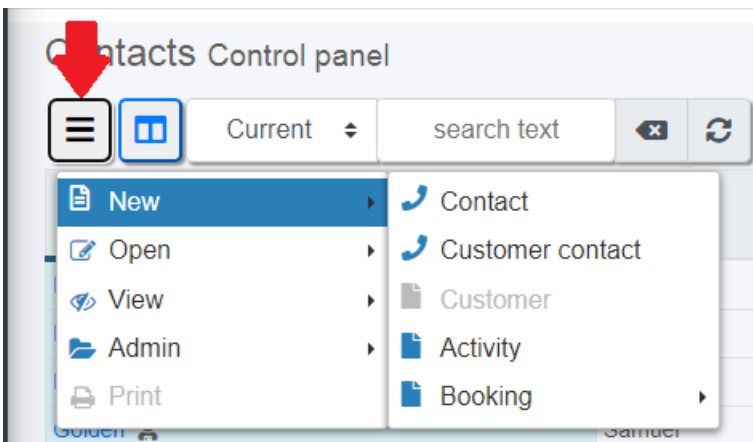
Contacts Control Panel


Last Modified on 30/03/2022 4:17 pm EDT

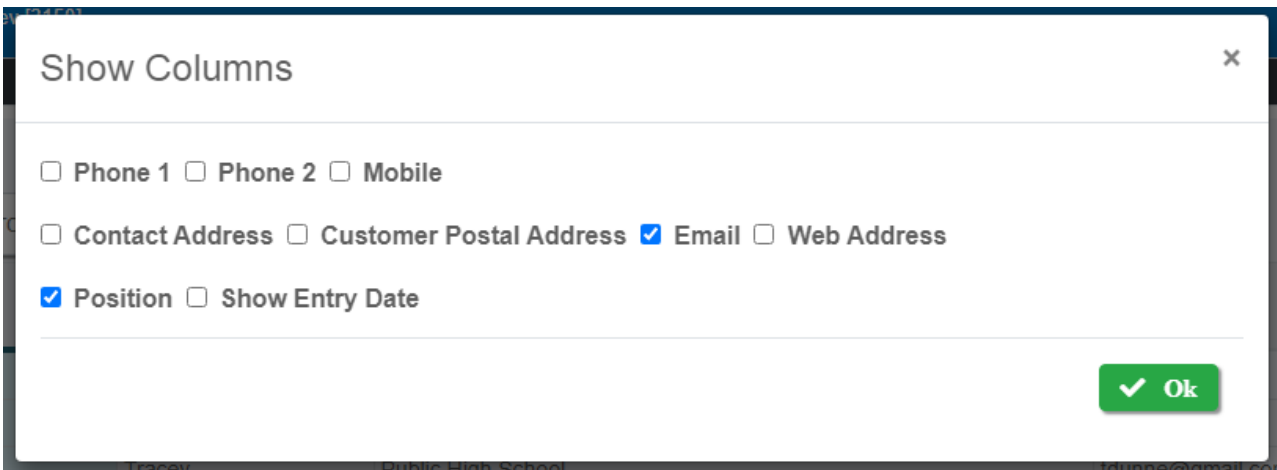
Fig 1.1 - reference the number on the screenshot against the index below for more detail



1. Access to the Contacts Action menu

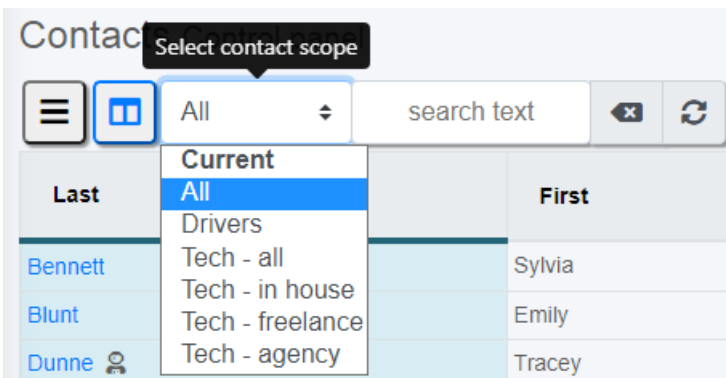


2. Use  to select columns to display on the grid



3. Select Contact Scope allows for a more targeted view of contacts - use this in conjunction with 7 below to narrow the scope further.






'Current' will show all records edited/updated/added recently.



4. Enter search text to search for a specific contact or contacts for a particular company

5. Narrow the scope to a selected salesperson

6. Easily identify technician type and driver status via icons & colouring on the grid as (as set on the contracting tab for each technician):

-  In house technician
-  Agency technician
-  Freelance technician (displays in green)
-  Truck driver
-  Project Manager

7. Narrow the grid scope by setting the number of months to look back for updated contact records.

