# ENTERING CONTACTS & COMPANIES in SOLVE 360

- Contacts
  - Click "**Create a contact**"
  - Fill out as much information as you have
    - First Name
    - Preferred Name (nickname or repeat first name)
    - Last Name
    - Phone
    - Personal Email
    - Home Address
    - Client Manager: This field must be assigned (office Manager if unknown)
- Click "**Hide Form"**
- Add Category Tags: Use as many tags as are appropriate from the following (other tags are only in use for historical reference):
    - Primary Contact
    - James Taxpayer is the "**Client**." Diane Taxpayer is his spouse and also has the "**Client**" tag. She is the one who makes the appointment and follows up on Missing Information, etc, so she also has the "**Primary Contact**" tag for the couple. This is the person to contact regarding the return.
    - Any single individual is a "**Primary Contact**" by default
    - Other Contact Tags
    - "**Affiliate**" - professionals that we work with (as opposed to an advisor that a client has a relationship with
    - "**Prospect**"- the person is currently a prospect, and not yet a client
    - "**Prospect – hot**" – the person is a hot prospect
    - Personal referral (noted in the "Related To" field)
    - "**Client**"- current client
    - "**At Risk**" – client has voiced considering leaving
    - "**Former Client**"- PY return not filed or not returning for the present year
    - "**10K**" – Jim's Babson 10K Program contacts
    - "**Hockey**" – Professional Hockey Player Sean & Kim only!
- Connect (link) husband and wife, referral source, etc ( see next page)

- Companies
  - Click "**or company**" to the right of "Create a contact"
  - Fill out fields as above
  - Add appropriate Category Tags
  - Connect (Link) company, owner, etc (see next page)

<u>CONNECTING (linking) COMPANIES & CONTACTS</u>

- In the form there are available entries for "Company" (within a Contact) and "Related Company" (within a Company) where you may enter one or more Companies related to the client. These would include parent companies, sister companies, subsidiaries, or companies owned in whole or part by a related Contact.
    - The available list of companies to add are those within Solve
    - The field will Autocomplete as you enter a name
- In the form there are available entries for "Related To" (within Contacts and Companies) where you may enter any Contact or Project Blog name related to the client (i.e. The spouse/child/relative of a Primary Contact or a Personal Referral)
- Any number of contacts and blogs may be related to one another or to companies. This is the crux of viewing all work done for a client through the client information within the Contacts Tab
    - **All Companies and individual Contacts must be related to a Primary Contact**
    - **Relate a Company to all Project Blogs connected to work for that company (all blogs can be found under the Company file)**
        - **Relate a Contact to a Company if applicable (all blogs can be found under the company file)**
            - **If no Company, relate the Primary Contact to all individual blogs connected to the Contact (all blogs can be found under the Primary Contact)**