

Contacts

This Focus Guide is designed for Spitfire Project Management System users. In this guide you will learn about roles and how to create, modify and use Contact information.

www.spitfiremanagement.com

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ocus Guide

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Table of Contents

About Our Documentation 6 Guides 6 The Knowledge Base 7 White Papers 7
Introduction to This Guide8
Understanding Roles9Capabilities9Responsibilities10Organizational Level11
Companies and Individual Contacts12Companies12Types of Companies12Preliminary Companies12Detail Information12Company Detail13Contact Detail13Contacts14Types of Contacts14
Detail Information
Tabs on the Contact and Company Details15Address Tab15Possible Fields15Alerts Tab17Attributes Tab17Fields18Comments Tab19Fields19Connections Tab20Possible Fields20Default Responsibility22CSI Tab22Fields22General Tab23Possible Fields24Member Of Tab26Possible Fields24Member Of Tab26Possible Fields24Member Of Tab26Possible Fields24Member Of Tab26Possible Fields26Assigning Roles27About "Limit By Project"28Demoting/ Promoting Roles29Notification Tab30Fields31Region Tab32Fields32Fields32
Accessing Contact Details34Your Detail Information34Changing Your Password34Change Password Pop-Up35Changing Your Notification Levels36Suppressing E-mail Notifications36Establishing a Proxy37

Contact Information from Documents Contact Information Cards Accessing the Contact Information Card	. 39
Project Team Contacts	41
Item Grid View	. 41
Columns	
Filters	
Adding New Team Contacts	
Removing a Team Contact	. 44
Show vs. Hide Contacts Public and Active Statuses	
Public and Active Statuses	
Active vs. Inactive	
Members Like Filter	
Edit Grid Information	
Another Role	. 47
Contact Details	
Website URL	. 48
The Contacts Dashboard	. 49
Contacts View	. 49
The Filters	
In-Column Filtering	
The Columns	. 51
The Contact Options Menu*	. 51
Companies View The Filters	
In-Column Filtering	
The Columns	
Adding New Contacts	51
Preliminary Companies	
Adding Pre-Vendors	
From Pre-Vendors to Full Contacts	. 56
Integrated Sites	
Non-integrated Sites	
Adding Full Contact Companies	
Integrated Sites	
Non-integrated Sites	
Adding Unmapped Employees	
Updating Contacts	
Integrated Sites vs. Non-integrated Sites Editing Companies	
Editing Individual Contacts	
Unlinking Contacts from Companies	
-	
Removing and Merging Contacts Deleting vs. Deactivating Contacts	
Deleting Contacts	
Deactivating Contacts	
Merging Two Contact Records	
Ĕxample	
Associated Documents	68
Employee Document	
	. 68
Customer Document	

Vendor Document	
Mid-section Tabs	71
Details	71
Info	72
Contacts	72
Compliance	72
Associated Manage Dashboard Tools	73
CSI Maintenance	73
Region Maintenance	73

About Our Documentation

The Spitfire Project Management System (sfPMS) is extensive and powerful. Learning about all that you can do with it takes time. To help you learn, we provide various forms of documentation. Because one large all-inclusive manual would be too unwieldy and take too long to download, we provide smaller units of documentation—guides, knowledge base articles, and technical white papers.

Guides

Our guides, which include an <u>Overview Guide</u> and various other guides, focus on specific areas or tasks in sfPMS. Often, one Focus Guide will refer you to a second Focus Guide when an overlapping section is described in more detail in the second guide. By reading the guides, you will get a good understanding of the system in general and you will learn procedures for how to do many of the things that sfPMS allows you to do. We suggest you read the <u>Overview Guide</u> first, followed by other Focus Guides as needed.

To access the guides:

- 1. Log in to sfPMS.
- 2. Click Help at the top of the Spitfire Dashboard:

	Andrew Carothers 🗮 Help Home
Help Browser	×
Make a selection:	^
Knowledge Base	
KB About Home Dashboard	
Tutorial for Home Dashboard	
Icon Quick Reference	
Overview Guide Focus Guides	
Pocus Guides Document and Item Basics	
• Files and Catalog	
Routing	
Alerts and Compliance	
Batch Processing	
BFA Workbook	
 Budgets and Period Distribu Contacts 	tion
Doc Templates	
 Doc Types and Project Work 	flow
Forecast and Analysis Manage Dashboard	
 Manage Dashboard SOV Billing 	
System Administration	
Refresh Guide List	
White Papers	
E Spitfire Opline	
 Spitfire Online SpitfireManagement.com 	
Blogs	▼

3. Select either **Overview Guide** or one of the choices under **Focus Guides**:

The guide will appear as a PDF file.

The Knowledge Base

The Knowledgebase contains articles, in a question-and-answer format, that cover either more specific or more technical information about sfPMS. The Knowledgebase is accessed through the same Help menu as the guides:

	Andrew Carothers 🗮 🛛 Help Home
Help Browser	×
Make a selection:	
 Knowledge Base KB About Home Dashboard Tutorial for Home Dashboard 	

Articles in the Knowledge Base are numbered, for example, KBA-01044.

White Papers

White papers (also known as technical white papers) are documents that delve into some of the more technical aspects of sfPMS. White papers are accessed through the same Help menu:

Andrew Carot	hers = Help	Home
Help Browser		×
Make a selection:		
Knowledge Base		
KB About Home Dashboard		
 Tutorial for Home Dashboard 		
Icon Quick Reference		
Overview Guide		
Focus Guides		
White Papers		
ATC Scripts and Workflow		
Bid Package - RFQ Processing		
Change Order Management		
Data and Equipment Projects		
Designing User Roles		
 Hard Copies of SF Docs and Attachments 	;	
 Pay Application Print Templates (PAPTs) 		
Quick Doc Type Reference		
Rules and Rule Values		
 Setup for Spitfire's Plan Room 		
Spitfire Item Templates (for Via Excel)		
Spitfire Reports		
Spitfire's App for Android		
Spitfire's Import Utility Tool		
Using Billing Codes for SOV		
 Viewing Changes through sfChest Working with Production Units 		
working with Froduction offics		

Introduction to This Guide

Spitfire Contacts include all those individuals and companies with whom you do business. Not all Spitfire Contacts are users, but all users are Spitfire Contacts.

The Spitfire Contact list includes your vendors, your customers, your employees, and even other individuals and companies with whom you correspond or consult on your projects.

Contacts are assigned roles and responsibilities that affect what they can access and do in sfPMS.

This guide focuses on the explanation of roles and the creation, modification, and use of Contact information in the Spitfire Project Management System (sfPMS).

This guide assumes some familiarity with sfPMS and Spitfire documents as described in the <u>Overview Guide</u> and <u>Focus on Documents and Item</u> <u>Basics</u>, found on the Help Menu in sfPMS.

Note: section, chapters and text that are new or changed from the V4.4 documentation appear with **green text** and sometimes an *.

Understanding Roles

An understanding of Contacts in sfPMS requires an understanding of roles. Roles are created and capabilities are assigned during the implementation stage of sfPMS.

A role has two functions:

- First, it is a collection of capabilities that grant the users who are members of this role specific access rights and permissions to Spitfire functions and data.
- Second, it is a Project Responsibility identifier. By identifying a Contact's responsibility on a project, Spitfire knows how certain roles fit into the organization of a project, regardless of what the roles are actually called.

From your perspective, roles often correspond to job titles. Some examples of Spitfire roles are Project Lead, Architect, Supervisor, Project Assistant, System Manager, etc. All Spitfire users are automatically given the role of **Everyone**.

Capabilities

Roles are defined with capabilities that determine what a person with that role can do or see in sfPMS.

Full Access Rights	Minimum Access Rights		
Notice that the user has the ability to edit the document and can add new Attachments and folders. In addition, on the Items tab, all Items are visible and can even be deleted.	Notice that the fields are read-only and that the user cannot add new Attachments. In addition, Items are not visible the Item Folder's toolbar is inactive, and the File Options menu is not available. PunchList-Open HVAC Punch List Doc# 0004 PROJECT GC-003 Northern Lights Office Bidg DESCRIPTION HVAC Punch List STATUS Open Date 10/6/2014 Due 10/24/2014 Items Folder 1 Description Status		
Attachments Route Detail	Attachments Route Detail		

		Full Access Rig	ghts	Minimum Access Rights	
On the Route Detail tab, the user can view all routees, add new ones and delete upcoming ones. Once the user sends the document on its route, he or she can access the document later from either the Project Dashboard or Catalog Dashboard. Attachments Route Detail E Seq To			the user sends the cess the document later talog Dashboard.	On the Route Detail tab, the user sees only his/her route line and cannot add to or edit the routing list. Once the user sends the document on its route, the document will no longer be in the user's Inbox on the Home Dashboard. Therefore, the user will no longer have access to the document, except through the Recent Documents option on the Site Options menu.	
=	Seq	То	Status		
= 🖌	1	Chris Demo (Superintendent)	Pending 🗸		
=	2	Margie Smith Margie and Sons	Pending 🔽	- Contra Soni In In In In	
=	3	Andrew Carothers (Project Assistant)	Pending 🗸	= 🛃 👔 2 Sonn York Pending 🔽	
-					

Responsibilities

Internally, sfPMS understands the responsibilities of the following:

- Accountant
- Alternate CM
- Alternate PM
- Architect
- Associate
- Bonder
- Construction Manager
- Customer/Owner
- Development Manager
- General Contractor
- Junior PM
- Lender
- Operations Manager
- Project Manager
- Project Staff
- Senior Executive
- Senior PM
- Superintendent

When roles are set up, they can be identified with one of the above responsibilities so that Spitfire knows the "weight" of that role (i.e. what kind of role it is within a project). For example, you (or your System Administrator) may have created a role called **Project Lead** and assigned it the responsibility of **Project Manager**. Spitfire would therefore know that the "Project Lead" is the Project Manager on a project.

More information about roles is available in the technical white paper <u>Designing User Roles</u> and the <u>Focus on System</u> <u>Administration</u> guide.

TIP

As another example, you may have created several roles for your subcontractors such as **Electrical Subcontractor**, **Roofing Subcontractor** and **HVAC Subcontractor** and given all of them the responsibility of **Associate**. Again, Spitfire would then know where these roles fit in on a project. Because roles are user-named and defined, Spitfire uses responsibilities to identify the roles needed in certain locations (such as the Contacts part on the Project Dashboard and on various reports).

Note: Responsibilities are not required for Spitfire roles; there can be roles that do not have any of the above responsibilities.

Organizational Level

One of the ways to control which Contacts can see other Contacts is through the use of Organizational Levels assigned to individuals.

Organizational Levels are numerical values assigned to Contacts by the System Administrator or Manager. When Organizational Levels are used, a Contact can view:

- All Contacts below his/her Organizational Level
- All Contacts above his/her Organization Level as long as the Organization Level value of those Contacts are not more than 9% above that user's own Organization Level.

For example, if Contacts are assigned the following Organizational Levels:

Organization Level	Sample Contacts
100	Chris Demo (who is a Senior Executive)
90	John Smith (who is a Project Manager)
85	William Flint (who is Project Staff)

Then:

Organization Level	Can View the following levels in Contact Lookup
100	All Levels
90	All Levels
85	Levels 90 and 85

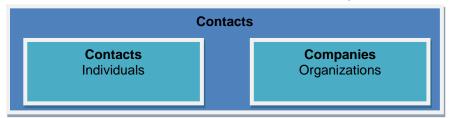
So Chris Demo and John Smith can see all other Contacts but William Flint can see John Smith but not Chris Demo based on Organizational levels.

TIP

Organizational level is just one factor in determining if a Contact can see other Contacts. Other factors include the permission to "see all Contacts" and whether a Contact is <u>public</u> or not (see page 45).

Companies and Individual Contacts

"Contacts" in Spitfire can refer to companies (organizations) and people (both those who work in these companies and those who do not). Sometimes, however, the term "Contact" is used to mean just individuals.



Companies

Types of Companies

Companies in sfPMS are assigned one of the following types:

- **Customer**: companies that hire you/your company. **Note:** If you are integrated with Microsoft Dynamics SL, these are your Customer records.
- Vendor: companies that you/your company hires. Note: If you are integrated with Microsoft Dynamics SL or Acumatica Cloud ERP, these are your Vendor records.
- Other: any other company that you want to include in sfPMS.

Preliminary Companies

Regardless of type, companies in sfPMS that have an ID (either through Spitfire. Microsoft Dynamics SL, or Acumatica Cloud ERP) are considered full Contacts. Companies that are added without an ID are considered preliminary companies (pre-vendors or pre-customers). Preliminary companies will show up in lookups and can be added to a document's route. These companies can be given an ID at a later time, making them full Contacts. (See page 54 for more information.)

Detail Information

The information for companies is shown in both a Company Detail window and a Contacts Detail window. Both of these views are available from the <u>Contacts Dashboard</u> (see page 49).

Company Detail

The Company Detail window has information about a company that is not seen on the Contact Detail window.

	1	COMPANY DETAIL		
Vendor Company	Addre	ess Attributes Region CSI Comments		
		Appart Able Electric Type Vendor V Project Purchasing DRESS 111 Meandering Lane 10 AB01		
	ADD			
	Сп	try/St Lakeridge , OR 99999 Country		
	Тіме	zone Pacific Standard Time (North America) - UTC-08 🔽	_	
	E	EMAIL jsunderson@ableelec.com PHONE (555) 555-1212	2	
		URL FAX(555) 555-1212		

	COMPANY DETAIL		
Customer — Company	Address Attributes Region CSI Comments		
	Company Able Electric Type Vendor 🗹 🗹 Project Purchasing		
	ADDRESS 111 Meandering Lane ID AB01		
	Citry/St[Lakeridge , OR 999999 County		
	TIME ZONE Pacific Standard Time (North America) - UTC-08		
	EMAIL jsunderson@ableelec.com PHONE (555) 555-1212		
	URL FAX(555) 555-1212		

For a <u>description of the fields</u> that appear on the Address, Attributes, Region, CSI, and Comments tabs, see page 15.

Contact Detail

The Contact Detail window for a company has information that is not seen on the Company Detail window.

COMPANY DETAIL						
Address Attributes Region CSI Comments						
Company Able Electric	Type Vendor V Project Purchasing					
Address 111 Meandering Lane	ID AB01					
CITY/STLakeridge , OR 99999 County						
TIME ZONE Pacific Standard Time (North America) - UTC-08 🔽						
EMail jsunderson@ableelec.com	PHONE (555) 555-1212					
URL	Fax (555) 555-1212					

For a <u>description of the fields</u> that appear on the General, Address, Member Of, Connections, Notification and Comments tabs, see page 15.

Aside from the Contacts Dashboard, the Contact Detail window for a company can be accessed from other locations in sfPMS— the Contacts part on a <u>Project Dashboard</u> (see page 41) and certain document <u>drop-down menus</u> (see page 38). Your Spitfire role determines where you can access Contact Details and how much you can see or edit.

Contacts

Types of Contacts

People in sfPMS are assigned one of the following types:

- Customer: people who are linked to Customer companies.
- Vendor: people who are linked to Vendor companies.
- Other: people who are linked to Other companies.
- **Employee:** people who work at your company.

Detail Information

Information about the people in sfPMS can be seen in their Contact Detail window.

Contact Detail

If you have access to the Contacts Dashboard, you can open the Contact Detail window for any person in your system.

CONTACT DETAIL								
General A	ddress Member	Of Connection	ons Notification	Comments				
CONTACT NAME	Margie Smith				Тітце			
SORT NAME	SORT NAME Margie Smith							
EMAIL					COMPANY Margie and Sons	2		
USER LOGIN PASSWORD		VALID UNTIL:	(forever)					
CONFIRM PASSWORD:			RES		VENDOR HC01	1		
OLD PASSWORD:	:				EMPLOYEE Specify Employee ID	2		
LOCKED UNTL: (not locked) 📕 (no reason)								
	Expire Account if	JNUSED						
	MUST CHANGE PASS	VORD						

For a <u>description of the fields</u> that appear on the General, Address, Member Of, Connections, Notification and Comments tabs, see page 15.

The Contact Details window for a person can also be accessed from other locations in sfPMS—your <u>user preferences</u> (see page 34), the Contacts part on a <u>Project Dashboard</u> (see page 41) and certain document <u>drop-down menus</u> (see page 38). Your Spitfire role determines where you can access Contact Details and how much you can see or edit.

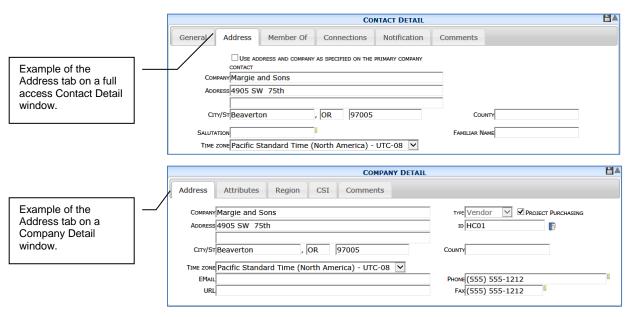
Tabs on the Contact and Company Details

Depending on your permission level and <u>from where you access the</u> <u>Contact Details</u> for a person or company (see page 34), you may see any of the following tabs with some or all of the described fields. The Company Details window displays its own tabs, also described below.

Address Tab

The Address tab is available

From	For	On
Contacts Dashboard	All Contacts	Contact Detail
	Companies	Company Detail
Elsewhere	All Contacts	Contact Detail



Note: If the Contact is integrated with a Microsoft Dynamics SL or Acumatica Cloud ERP record, the address fields are pre-filled. You cannot edit the data in Spitfire, but must edit it directly in Microsoft Dynamics SL or Acumatica Cloud ERP.

If information is not filled in automatically, you can fill in all the fields on this tab yourself.

Possible Fields

TIP

Users can be given the permission to see all items assigned to other Contacts in their company. The Company field on the Address tab is used to determine to which "company" a user is linked.

- Use Address and Company as Specified on the Primary Company Contact: If checked ☑, the Company field and Address fields (including City/St) will get their information from the Company Contact record to which this Contact is linked.
- **Company:** the name of the company (in a company record) or the company to which a Contact is linked.

- Address / City/St: the mailing address for the Company.
 Note: when you start typing in the City or ZIP code fields, sfPMS will offer a drop-down of possible choices. Use the arrow keys on your keyboard to select one of the choices.
- Salutation: indicates how you want the Contact to be addressed in a letter. This field is used mainly in merge templates. Type anything you want to appear in the printout, for example, "To Whom It May Concern" or a salutation (e.g., *Dear* or *Dear Mr.*) followed by ~ and a placeholder:

SALUTATION Dear Mr. ~S

- **~U** is replaced by Contact Name (e.g., *Dear* John Smith)
- **~F** is replaced by Familiar Name (e.g., *Dear* Jack)
- **~S** is replaced by Sort Name (e.g., *Dear Mr.* Smith)
- **~C** is replaced by Company Name (e.g., *Dear* S & S)
- **~T** is replaced by Title (e.g., *Dear Mr.* President)
- **~R** is replaced by Role (e.g., *Dear* Senior Executive)
- **Time Zone:** the time zone to associate with this Contact. Once indicated, time will reflect that time zone when the Contact is logged in.
- **Email:** the email to be used for a company in general (as opposed to emails of Contacts within the company).
- URL: the website of a company.
- Type: the type of company. Type can be Customer, Vendor, or Other. See page 12 for more information. This field appears only on the Company Detail window.
 Note: If you are integrated with Microsoft Dynamics SL or Acumatica Cloud ERP, the drop-down is disabled and the Type designation is controlled by the integrated software.
- **Project Purchasing:** When checked **I**, indicates that the company is a project purchasing vendor and will appear on Commitment lookups. This checkbox appears only on the Company Detail window.
- **ID:** the ID of the company. This field appears only on the Company Detail window.
- Example: This icon opens the corresponding Vendor or Customer document, if the company has a Type of Vendor or Customer.
- County: the county where the company is located.
- **Familiar Name:** any nickname or short version of the Contact's name. This field is used often in merge templates.
- **Phone /Fax**: the main phone number / fax number of a company. You should type only the numbers for the phone number. It will be formatted (with parentheses and dashes) as you type.

Alerts Tab

The Alerts tab is available

From	For	On
Elsewhere	All Contacts	Contact Detail

Note: there is no Alerts tab on the Contact Detail window that is opened from the Contacts Dashboard because managers can set up global Alert Subscriptions through the Alert Subscriptions tool on the Manage Dashboard.

Chris Demo			_						• <mark>• ×</mark>
			(CONTACT DETAI	L				Ľ
General	Address	Member Of	Connections	Notification	Alerts	Comments			
DOC TYPE: Alert			✓	PROJECT					
Alert	Alert	Description	Recurs Lead Time	Doc Type	Cor	npany	Project	EMailNotify	Active
								5	PITFIF

A thorough explanation of Alerts and Alert Subscriptions can be found in the *Focus on Alerts and Compliance* guide.

Attributes Tab

Information entered on a company's Attributes tab applies to all Contacts at that company.

The Attributes tab is available

From	For	On
Contact Dashboard	Companies	Company Detail
Elsewhere	Companies	Contact Detail

Address Attributes	Region CSI	Comments			
TYPE Instr	uction 🔽				
	Value		Spec	Note	Amount
	MBE - Minority				
	WBE - Women				
WBE - Women	×	Ī			

Fields

TIP

For more information about the Code Maintenance tool, see the <u>Focus on System</u> <u>Administration</u> guide.

- **Type** (*drop-down*): a filter on attribute type. The Type dropdown displays choices set up through the AttrType code for Vendors in the Code Maintenance tool. If no Type is selected, all attributes for the company will be listed.
- **Type:** (*column*) the attribute type for the attribute. This column disappears when a Type filter is selected.
- **Value:** the specific value for the attribute. Value choices are defined in the Code Maintenance tool.
- **Spec:** more specific information about the attribute value. This field might not appear for all attribute types.
- Note: any freeform text for the attribute value.
- **Amount**: any number associated with the attribute value.

Note: certain attributes serve as filters on Vendor lookups:

Lookup Dialog	1	×
Project Vendors		
	ALL FILTERS	
COMPANY		
VENDOR ID		
CITY		
STATE		
ZIP		
CSI		
RATING		
RANGE	☑ 08/28/2010 💷 📌 10/06/2014 🔢 Refresh	
TIMES USED		
VALUE		
LARGEST AWARDE		
TYPE		
SOURCE		
ON TEAM		
REGION	<u> </u>	
UNION		
MINORITY		

To add a new attribute value:

1. On the Attributes tab, select a **Type** from the drop-down menu.

Address	Attri	butes	Region	
Түре		Instru	ction 🔽	
≡ /		Classif EEO		
-		Instruc Labor License Refere	Source e	

- 2. Click \equiv to open the Options menu then select **b** Add New.
- 3. Select a Value.
- 4. Enter a Spec, Note and/or Amount as appropriate.
- 5. Click \checkmark to accept your changes and \blacksquare to save them.

Comments Tab

Comments are a quick way to track some remarks about a Contact, for example, skills, training classes, licenses, etc. Other users may be able to view the Comments entered in your own Contact record, so use this Comment section accordingly.

The Comments tab is available

From	For	On
Contacts Dashboard	All Contacts	Contact Detail
	Companies	Company Detail
Elsewhere	All Contacts	Contact Detail

Ade	dress	Attributes	Region	CSI	Comments			
0-	Added	Ву	Rema rk					
JX	10/7/2014-	Chris Demo						
			!					

Fields

- **Added:** the date a remark was entered. This field is populated automatically.
- **By:** the person who entered a remark. This field is populated automatically.
- **Remark:** a remark visible to the public. Comments are visible to users in their own Detail window and in the Contact's Detail view from the Project Dashboard.

To add or edit a comment:

- 1. To add, click 🔂. To edit, click 🖊 .
- 2. Enter or change the Remark.
- 3. Click \checkmark to accept your changes and \blacksquare to save them.

Connections Tab

The Connections tab is available

From	For	On	
Contacts Dashboard	All Contacts	Contact Detail	
Elsewhere	All Contacts	Contact Detail	

CONTA	CT DETAIL	
General Address Member Of Connections	Notification Comments	
PHONE (503) 452-6981 CELL PAGER FAX (503) 452-6981 IM HANDLE ORGANIZATIONAL LEVEL 0 URL	PREFERRED CONTACT NUMBER Phone PEFAULT RESPONSIBILITY ROUTE VIA Web ALLOW ROUTE ACTION PROXY IM SERVICE: n/a SHOW New PROJECTS	2
Suppress e-Mail Notices Until:	Signature: /	

Possible Fields

• Phone, Cell, Pager, Fax: numbers in the format of (*nnn*) *nnn-nnnn*. You can also enter a plus sign + followed by a string of numbers.

Note: you should type only the numbers for the phone number. It will be formatted (with parentheses and dashes) as you type.

- **IM Handle:** the Instant Message handle (IM name) for the Contact.
- **Organizational Level:** the Organization Level of the Contact. The default of 0 indicates that Organizational Levels are not being used in this installation. (See page 11 for more on <u>Organizational Levels</u>.)
- URL: This field specifies a website associated with the Contact.
- Suppress E-Mail Notices Until: a date which indicates the last day that email notifications should be suppressed (see also below). Use this field if you know that the Contact is on vacation and/or away from email for a known period of time.
- **Preferred Contact Number:** the type of number (Cell, Pager, Phone) that should be displayed in the Contacts part on the Project Dashboard.

		CON	TACT LIST
0	Name	6 Company	Email Phone
	Margie's Travel 🗧	Margie's Travel	(555) 555-1212
$\sim\sim\sim\sim$	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	******	

TIP

For more information about routing, see the *Focus on Routes* guide.

• **Default Responsibility:** the default responsibility for a Contact, if any apply. (See page 10 for an explanation of <u>responsibilities</u>.) When the Contact is added to the Contact list on a Project Dashboard, this responsibility appears by default in the Role column. (The responsibility can then be changed to another role on the Contacts list if desired.)

	TEAM CONTACTS					
o 🕫	Name	Company	Phone	Role		
= 🚱	Jack McSwag	Spitfire Construction	(914) 273-0809	Project Manager		
=	Jason Sunderson	Able Electric Corp	(555) 555-1212	Subcontractor Base		
=	Chris Demo	Spitfire Construction	(203) 952-6552			
$\sim\sim\sim\sim$	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	•••••••	$\sim\sim\sim\sim\sim\sim$	h		

- **Route Via:** This drop-down determines how documents and files attached to the documents are to be routed to the Contact by default:
 - E-mail: printouts of the documents and attached files will be emailed to the email address specified on the General tab
 - Fax: printouts of the documents and attached files will be faxed to the Fax number specified on this Connections tab
 - Hard Copy: printouts of the documents and attached files need to be printed out in hard copy for manual delivery
 - **Web:** Spitfire documents will be sent to the Contact's Inbox on the Home Dashboard
 - Web (conditional): most Spitfire documents will be emailed or faxed (as above) but Doc types that are specified in the DocTypeConfig | LimitWebRouting rule will be sent to the Contact's Inbox instead.
- Allow Route Action Proxy: the role which is to serve as a proxy for the current Contact. Other users who have this proxy role can then take action (e.g., accept the route) on documents routed to the Contact. For example, if the Allow Route Action Proxy is Project Assistant, then the Project Assistant for a project can accept the route on documents routed to the Contact's Inbox.
- **IM Service:** the Instant Message handle (IM name) for the Contact.
- Show New Projects: When checked **I** and the Contact is assigned to a project, that project will appear in the Contact's Project List on the Home Dashboard.
- **Signature:** an image pasted into the text editor can be used as the signature in bookmark templates. **Note**: this field only appears for Employees or Contacts with the **CSTM | Internal** staff role capability.

<u>A-</u>	Ω. 🔳	• 🖽 🗄	× ₂ × ²	🚨 🝓	X	<u>م</u>	2	√ ₩
Font	~	Size	~	Formatting	~	Style		~

TIP

For more information about **DocTypeConfig** | **LimitWebRouting** and the Rules Maintenance tool, see <u>KBA-01154</u> and the <u>Rules and Rule</u> <u>Values</u> technical white paper.

TIP

For more information about role capabilities, see the <u>Designing User</u> <u>Roles</u> technical white paper.

TIP

If you have trouble pasting an image into the text editor, see <u>KBA-</u> 01586.

Default Responsibility

To change the default responsibility of a Contact:

1. Click $\stackrel{\mbox{$\mathcal{P}$}}{\sim}$ to look up and select a **Default Responsibility**:

			CO	NTACT DETAIL			
General	Address	Member Of	Connections	Notification	Comments		
		PHONE (757)	555-1212	PREFERRE	d Contact Number	Phone 🗸	~
		CELL (757)	800-1200	DEFAULT I	RESPONSIBILITY Pro	oject Staff	
		Lookup Dialog				~	
		Project Respor	nsibility		/		
			ALL FILTERS		Refresh		
	ORGANIZA	ROLENAME					
		Pick	Role Name 🗟	-			
SUPPRI	ess e-Mail No	M	Project Assistant				
			Project Staff				
			Senior Executive				
-			Superintendent				-
					S	ÎTÊÎŘE	
						J	

Note: Choices on the Responsibility lookup come from the Contact's assigned roles, so there may be only one or no choice for the Default Responsibility field (see page 10 for more information on <u>Responsibilities</u>).

2. Click 🔚 to save your information.

CSI Tab

Information entered on a company's CSI tab applies to all Contacts at that company.

The CSI tab is available

From	For	On
Contacts Dashboard	Vendor Companies	Company Detail
Elsewhere	Vendor Companies	Contact Detail

Note: the CSI tab is not available for other types of companies.

	COMPANY DETAIL							
Address	Attributes	Region	CSI	Comments				
ò	CSI Code			CSI Description	Active			
/ 前	16000			Electrical	\checkmark			
🗸 🗙 👘	×*							

Fields

- **CSI Code:** a CSI code associated with this company. CSI codes are defined in the <u>CSI Maintenance tool</u> (see page 73).
- **CSI Description:** a description of the CSI code as defined in the CSI Maintenance tool. The description is filled in when you add a row.
- Active: when checked **I**, the CSI code will be associated with the company and show up in results when CSI is used as a filter in the Vendor lookup:

Draia	ct \/ondora				
ргоје	ct Vendors				
		FILTERS			
Сом	PANY				Refresh
CSI 16					
RANG	GE 🛛 🗹 08/	30/2010	10/0	08/2014	
	,		,		
Pick	Company	ID	State	CSI	Rating 🗟
V	Margie and Sons	HC01	OR	16000 Electrical	85
V	Wingtip Engineers	TA01	OR	16000 Electrical	60
	Active Electric		WA	16000 Electrical	
\checkmark		AB01	OR	16000 Electrical	95
N N	Able Electric				

To add a new CSI code to a company:

- 1. Click to add a new row.
- 2. Click $\stackrel{?}{\sim}$ to lookup a **CSI Code**.
- 3. Click \checkmark to accept your changes and \blacksquare to save them.

General Tab

The Comments tab is available

From	For	On
Contacts Dashboard	All Contacts	Contact Detail
Elsewhere	All Contacts	Contact Detail

		CONTACT D	ETAIL		H٩
	General Address	Member Of Connections	Notification	Comments	
Example of the General tab when the	CONTACT NAME Margie Sm SORT NAME Margie Sm		т	Глт.е Түре Vendor 💙 🕞]
Contact Detail window is accessed for an individual from the Contacts		COMPANY Margie and Sons		2	
Dashboard.	User Login margie	VALID UNTIL: (fore	ver) 📧		_
	Confirm Password:		VEND	OR HC01	
	OLD PASSWORD:		EMPLOY	ree Specify Employee ID 🔏	
	LOCKED UNTIL: (not locke	ed) 🔠 (no reason)			
		CCOUNT IF UNUSED			
	Must Cha	ANGE PASSWORD			

Example of the General tab when the Contact Detail window is accessed for individuals or companies from somewhere else.

Possible Fields

TIP

The Active checkbox is not available for companies. To make a company inactive, make the company's primary Contact record inactive.

TIP

If your site is integrated with an external accounting system and your data is synched, the information for the Integrated User, Primary, User Login, Customer, Vendor, Employee, and Company fields will come from the accounting system.

			CONTACT DE	TAIL		
	General Address	Member Of	Connections	Notification	Comments	
	CONTACT NAME Margie	Smith	l		TITLE	
4	SORT NAME Margie	Smith			Type Vendor 🗹 🕞	
	EMAIL			Cor	MPANY Margie and Sons	2
		PUBLIC SP	ITFIRE USER 🗌 INTEG	GRATED USER		
		2	VALID UNTIL: (forev	rer) 📧		
	PASSWORD					
	CONFIRM PASSWORD:		NEVER EXPIRES	١	/ENDOR HC01	
	OLD PASSWORD:			Ем	PLOYEE Specify Employee ID	2
	LOCKED UNTIL: (not lo	cked) 🔠 (no re	ason)			
	Expir	RE ACCOUNT IF UNUSED	b			
	- Must	CHANGE PASSWORD				

- **Contact Name:** the name of the person or company. The Contact's full name is required. Upper and lower case letters are allowed, as are spaces.
- **Sort Name:** the name to use when Contacts are sorted internally.
- **Email:** the Contact's email address, which is required if you want this Contact to be a <u>Route Via "Email" routee</u> on any document (see page 21). The email address is also used by the Password Recovery Wizard.
- Active: Active Contacts I are those Contacts that are active in the system. Inactive Contacts □ cannot be used and do not show up in the Project Contact list or in lookups. Contacts who are inactive cannot log in to sfPMS.
- **Public:** Public Contacts **I** can be seen by all other Contacts. Private Contacts **□** can be seen only on projects on which they have been made public or by users with specific permission.
- Integrated User: If a Contact's record is linked to a user record in an external accounting system such as Microsoft Dynamics SL or Acumatica Cloud ERP, then this field displays *▼*. This field is for informational use only and cannot be selected or cleared. Note: this label sometimes appears as Microsoft Dynamics SL user if appropriate.
- **Title**: optional title for a person.
- Type: the type of company/contact for this Contact. Type can be Customer, Vendor, or Other (or also Employee for a person).
 <u>See pages</u> 12 and 14 for more information.
 Note: If you are integrated with an external accounting system, the drop-down is disabled and the Type designation is controlled by the integration.

- In: This icon opens the corresponding Customer, Vendor or Employee document.
- **Company:** the company to which a person belongs and is linked. Company Contact Details show the company name in both the **Company** and **Contact Name** fields.
- **User Login:** the login that this Spitfire user needs in order to log in to sfPMS. If this Contact is also a Microsoft Dynamics SL user, the Microsoft Dynamics SL Login name will automatically be entered and must remain the same.
- Valid Until: the date on which the user can no longer log in. Leave this field blank to mean "valid forever."
- **Password:** the password that this Spitfire user needs in order to log in to sfPMS. Passwords must be 4 to 32 characters and contain at least 1 numeric and 1 alpha character. For example: Dog5, sw55t, hot2trot, 12345A, etc. are all valid passwords. Once the **Password** is saved, it disappears from the General tab.
- **Confirm Password:** used only when changing the password, this field must match whatever is entered in the **Password** field.
- Never Expires:
 ✓ indicates that the password never expires.

 □ indicates that the password expires after the number of days specified in ICTool.
- **Old Password:** used only when changing the password, this field requires the Spitfire user's current password. System Administrators can change passwords without using this field.
- Locked Until: the date on which the user can log in again (having been locked out until then) and an optional message that appears when the user tries to log in before that date.
- Expire Account if Unused:
 indicates that the login ID should be considered invalid if there has been no activity through the Valid Until date.
 indicates that lack of activity will not invalidate the ID.
- Must Change Password: ✓ indicates that the user must change his or her password at the next login. If you want the user to change passwords only when determined by the ICTool setup and Never Expires option, keep this checkbox blank □.
- **Customer, Vendor:** the ID of the specific Customer or Vendor with which the Contact is associated. In addition, certain employees can also have a Vendor ID. See page 57.
- Employee: an Employee ID for this Contact.
- **Division ID:** the accounting software ID of the company to which an employee belongs. This field is filled in when the Employee field is used on integrated sites. On non-integrated sites, this field is a drop-down.

TIP

For more information about changing your password, see <u>the</u> <u>Overview Guide</u>.

TIP

Password expiration is set up in the sfPMS | Passwords tab in ICTool.

Member Of Tab

	From	For		On		
	Contacts Dashboard	All Conta	icts	Contact [Detail	
	Elsewhere	All Conta	icts	Contact [Detail	
		Co	NTACT DETAIL			
Example of the	General Address	Member Of	Connections	Notification	Comments	
Member Of tab when the Contact Detail window is accessed	ROLES LIKE:					
for from the Contacts Dashboard.	User's Role	:(s)		Additional Roles		
	Everyone			Accounting		
	RFQ Vendor	Contact		Architect Cataloger		
				Compliance Admin Int	ernal	
				Compliance Admin Ver		
			+	Concrete Sub		
			+	Consultant		
			+	Contact Admin		
			+	Drywall Sub		
Example of the				1 <u>2 3</u>		
Member Of tab when		Co	NTACT DETAIL			
the Contact Detail window is accessed from somewhere	General Address	Member Of	Connections	Notification	Comments	
else.	ROLES LIKE:					
	User's Role	e(s)		Additional Roles		
			▲			
	Everyone Everyone			Accounting		
	Everyone RFQ Vendor	Contact	+	Architect		
		Contact	+	Architect Cataloger		
		Contact	+ + +	Architect Cataloger Compliance Admin Int		
		Contact	+ + + +	Architect Cataloger Compliance Admin Int Compliance Admin Ver		
		Contact	++++	Architect Cataloger Compliance Admin Inb Compliance Admin Ver Concrete Sub		
		Contact	+++++++++++++++++++++++++++++++++++++++	Architect Cataloger Compliance Admin Int Compliance Admin Ver Concrete Sub Consultant		
		Contact	+++++++++++++++++++++++++++++++++++++++	Architect Cataloger Compliance Admin Inb Compliance Admin Ver Concrete Sub		

Possible Fields

Тір

For more information about the SYS | Add roles to Contacts role capabilities, see the technical white paper Designing User Roles.

- Roles Like: this filter displays matching roles on both the User's . Roles and Additional Roles sections. A wildcard (%) is assumed after what you type so, for example, if you type P in the Roles Like field, you will get a list of all roles that begin with P. In addition, you can use a wildcard before or around text so, if you type **%manager**, you would get a list of roles that end in manager.
- Projects Like: this filter displays matching projects on the User's . Role(s) section and only roles with the project condition on the Additional Roles section.
- User's Role(s): current roles for the Contact. If you have the • proper permission, you can add roles to Contacts provided those roles do not give the Contact greater access than you have.

- Additional Roles: possible roles that you can assign to this Contact. (See the next section for more information.)
- The User's Participation in this Role Is Limited By Project/Document Type/Reference: if the role is conditional on Project, Doc type, or Reference, you can indicate the specific Project, Doc type and/or Reference in these fields (see the instructions below).

Assigning Roles

You can assign roles to existing and new Contacts through the **Member Of** tab on the Contact Detail window. These roles will determine what users can access and do in sfPMS, and can identify users on the Project Contacts list. However, you will not see roles that include capabilities and permissions that you do not have in your own roles. In other words, you cannot give another user more access to the system than you have.

Note: Before they can appear on the Contact's **Member Of** tab, roles need to be defined or created through the Roles tool on the System Admin Dashboard. Normally, roles are set up during Implementation. See the technical white paper <u>Designing User Roles</u> for more information about setting up roles.

To assign a role to a Contact:

1. In the Additional Roles column, click \blacklozenge next to the desired role to move it to the User's Role(s) column.

	CONTACT DETAIL					
General	Address	Member Of	Conn	ections	Notification	Comments
Roles Liki Projects						
	User's Role(s	;)		Additiona	al Roles	
Û	Everyone		+	Accounting	9	
			+	Architect		
			+	Cataloger		
	Compliance Admin Internal					
	Compliance Admin Vendor					
			+	Concrete S	Sub	
			+	Consultan	t	
			+	Contact A	dmin	
			+	Drywall St	ub	
					1 <u>2 3</u>	

Notes:

- If there are multiple roles in the User's Role(s) column,
 the **1** icon will identify one as the default responsibility.
- If the role is limited by a condition (project, document type or reference) the word "unassigned" will appear next to it. (See the next section.)

	User's Role(s)		Add
İ	Everyone	+	RFQ
🕨 🗊 🕹 👘	Project Staff 🕕 (UNASSIGNED)	+	RTG
		4	Sen

To delete a Contact Role:

- On the Contact's **Member Of** tab, click **III** to remove a role. **Note**: you cannot view or delete a role that includes capability permissions that you do not have yourself.
- Click 💾 to save.
- If you look up a specific Project ID, the Contact will have the role's capabilities on that one project only, even if the Contact is added to other project teams. However, if the Contact is not already on a project team, indicating the Project ID here will automatically place the Contact on that project's team list.
- If you leave the field as **(unassigned)**—which is the default—the Contact will be given the role's capabilities on all projects to which the Contact is added as a team member, but not for other projects. This allows you to set up roles for Contacts before you have projects to which to assign them.
- If you blank out the field, the Contact will have the role's capabilities on all projects (global), whether a project team member or not. However, the Contact will not be on any project team unless specifically added to a project.

To limit a role:

- 1. Click **b** if you want to limit the unassigned role.
- 2. Enter or look up a project, document type or reference, depending on how the role was configured.

THE USER'S PARTICIPATION IN T	HIS ROLE IS LIMITED BY:	
PROJECT	(U-nassigned)	2
DOCUMENT TYPE	\checkmark	
REFERENCE		

See the "Demoting/Promoting" section below for more information about the Limit By Project option.

3. Click to save your new information. If the role can be copied, a new icon, used to copy the role, will appear next to the role, for example:

		User's Role(s)
Roles that can be copied are identified	- Ē	Everyone
by the si icon.	▶ 11(5)	Project Staff 🕦 GC003

About "Limit By Project"

TIP

For more information about <u>adding a Contact</u> to a project team, see page 41.

To copy a role:

1. Click in next to the role you want to copy. A copy of the role will appear below it, indicating the same condition, for example:

	User's Role(s)
Û	Everyone
1	Project Staff 🕕 GC003
🔺 🛅 🛵	Project Staff 🕕 GC003

- 2. Edit the copied role and change the condition in the fields that appear below.
- 3. Click 📥 to return to Grid view
- 4. Click 🔚 to save. The new condition for the role will appear:

	User's Role(s)
Û	Everyone
🕨 🛅 🔊	Project Staff 🕕 GC003
🕨 🗑 🕹	Project Staff 🕕 🚱

Demoting/ Promoting Roles

If a role has a blank (global) "Limit By Project" field, you can easily change that "Limit By Project" field to (unassigned) through the sicon. Two things will happen:

• The Project field will say (unassigned).

THE USER'S PARTICIPATION IN THIS ROLE IS LIMITED BY:
PROJECT (U-nassigned)

 If the Contact has been added to specific projects, the Contact will have the role assigned to those specific projects. (See example below.)

To demote a global role:

 Click I next to the role that currently has a blank (and therefore, global) "Limit By Project" field. If that Contact is on specific project teams, a message will so indicate on that row.

	User's Role(s)	
Û	Everyone	
🕨 🕅 🥺	Project Staff 🕦	ON 2 TEAMS

• Click to save. If the Contact is on specfic project teams, new rows will be added for each team, for example:

	User's Role(s)		
Û	Everyone		
🕨 🗊 😪 🛵	Project Staff 🕕 (UNASSIGNED)		
🕨 🗊 😓	Project Staff 🕕 GC003		
🕨 💼 😓	Project Staff 🕕 GC201		

To promote an (unassigned) role:

 Click down a role that you want to switch from (unassigned) to blank (global) for the "Limit By Project" field.

	User's Role(s)
1	Everyone
▶ (1)	Project Staff 🕕 (UNASSIGNED)

2. Click to save. If the Contact is on specfic project teams, a message will so indicate on the row.

	User's Role(s)	
1 III	Everyone	
🕨 🗊 😽	Project Staff 🕕	ON 2 TEAMS

Notification Tab

Notifications only apply to Spitfire users who have a login and password and are designated as users with the Route Via option set to **Web** (in the Connections tab). If Spitfire documents are routed to such Spitfire users and the Priority is set for email notification in the Notification tab, then those users will get an email in their regular email application advising them that a document is waiting for them in sfPMS. This feature is designed for occasional users, for example, a Subcontractor to whom you've given a login and password but who only logs in once a week or once a month. The email notification will alert this Subcontractor that he/she has a document in the Spitfire Inbox.

The Notification tab is available

From	For	On
Contacts Dashboard	All Contacts	Contact Detail
Elsewhere	All Contacts	Contact Detail

General	Address	Member Of	Connections	Notification	Comm	ents		
INCLUDES VITH FORWARDING								
	Document Type		\$	Send Emails For th	ese Prioritie	s Forv	ward Inbound Emails [*]	System Default
0	Bid			Urgent	\checkmark			×
		~]	(none) Urgent				
*Inbound	Emails are or	nly forwarded wh	ien you are the o	High, Urgent	^{nt} Urgent d	ler on	the document	

Fields

TIP

Email notifications are particularly helpful for users who do not log in to Spitfire very often.

TIP

For more information about the "email from" options, see the <u>Focus</u> on <u>Routes</u> guide.

- **Document Type:** all Doc types that are active in your system.
- Send Emails For these Priorities: the document priority level or levels that will trigger email notifications. For example, if **High, Urgent** is set for Commitments, then an email will be sent to the Contact every time a Commitment with a priority of High or Urgent is routed to the Contact's Inbox.

Note: Priority levels are established for documents at the bottom of the Route Detail tab, for example:

1	Atta	ach	mei	nts Route Detail						
	≡		Seq	То	Status	Ins	Rsp		Notes	Due
	=	6	1	Chris Demo (Superintendent)	Pending 🗸		1	~		Due: Oct 08 11:07 Viewed: Oct 08 11:07
	=	Ŵ	2	William Flint Spitfire Construction (Project Staff)	Pending 🗸	1			/	
					DENTIAL			PRIORITY	High	~

Forward Inbound Emails: when checked, indicates that you want the system to forward inbound document emails to your email client (e.g., Microsoft Outlook or Google Gmail).
 Note: Inbound emails are forwarded only when you are the "email from" sender on the document.

To change the Notification options when showing defaults:

1. (*if necessary*) Click the **Show Defaults** checkbox to check this option.

General	Address Member Of	Connections	Notification	Comm	ents	
INCLUDES WITH FORWARDING						
	Document Type	1	Send Emails For thes Priorities	ie	Forward Inbound Emails [*]	System Default
0	Bid		Urgent	~		×
	Bid Package		High, Urgent	~		√
	Bid Package Addendum		High, Urgent	~		√
	Budget		High, Urgent	~		√
	Catalog File Route		High, Urgent 🗸			v
	ссо		High, Urgent	~		v
	Change Item Register		High, Urgent	~		v
	Change Order		High, Urgent	~		v
	Commitment		High, Urgent	~		v
	Compliance Notification		High, Urgent	~		✓
Z		~				

- 2. At the Document Type you want to edit, select the new priority (or priorities) from the drop-down menu and check (or uncheck) the Forward Inbound Emails checkbox.
- 3. Click ²⁰ at any document type to quickly reset the priority level back to **High**, **Urgent**.
- 4. Click 🛅 to save your changes.

To change Notification options when not showing defaults.

- 1. Select a **Document Type** from the drop-down menu.
- 2. Select the new priority (or priorities) from the **Send Emails for these Priorities** drop-down menu and check (or uncheck) the Forward Inbound Emails checkbox.
- 3. Click 💾 to save your changes.

Region Tab

Information entered on a company's Region tab applies to all Contacts at that company.

The Region tab is available

From	For	On
Contacts Dashboard	Companies	Company Detail
Elsewhere	Companies	Contact Detail

COMPANY DETAIL					
Address	Attributes	Region	CSI	Comments	
à	Region	Comment			Active
6 前	ма				✓
🗸 🗙 -	<u> </u>			/	

Fields

- **Region:** the region(s) of the company. Possible regions are established through the <u>Region Maintenance tool</u> (see page 73).
- **Comment:** any free form text message associated with the region.
- Active: when checked *I*, the region will be associated with the company and show up in results when Region is used as a filter in the Vendor lookup:

Lookup Dialog					
Project Vendors					
	ALL FILTERS				
COMPANY					
VENDOR ID					
CITY					
STATE	}				
ZIP	{				
CSI	{				
RATING	Ś				
RANGE	☑ 08/30/2010 🔲 🕶 10/08/2014 🔠 🗦				
TIMES USED					
VALUE	{				
LARGEST AWARDED	Ś				
Түре	<u> </u>				
SOURCE	<u> </u>				
ON TEAM					
	<u> </u>				

To add a new region to a company:

- 1. Click boot to add a new row.
- 2. Click \cancel{R} to lookup a **Region**.
- 3. (optional) Enter a **Comment**.
- 4. Click \checkmark to accept your changes and \blacksquare to save them.

Accessing Contact Details

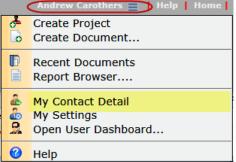
While certain users will have access to Contact (and Company) Detail information on the <u>Contacts Dashboard</u> (see page 49), more users have read or full access to Contact Details from outside the Contacts Dashboard, for example, from the Team Contacts part of a Project Dashboard (see next chapter). All users, however, can see their own Contact Details.

Your Detail Information

Before you can log in and use sfPMS, a System Administrator or Manager needs to <u>add you as a Spitfire user</u> (as described on page 54). Once you are a user, you can access your detail information and edit some of it.

To access your Detail information:

- 1. Log in to sfPMS.
- 2. Click your name to open the Site Options menu.



3. Select 📥 My Contact Details. Your Detail window will open:

For descriptions of the <u>fields on the Contact Detail window</u>, see page 15.

Changing Your Password

To change your password from the Contacts Details window:

 On the General tab of your Contact Detail window, type a new password in the **Password** field. Your password must be between 4 and 32 characters long (inclusive) and contain at least 1 numeric and 1 alpha character and include no special characters, for example: Dog5, sw55t, hot2trot, 12345A, etc.

		CONT	ACT DETAIL
General Address	Member Of	Connections	Notificat
	v Carothers		
SORT NAME Caroth	ers		
EMAIL and yc	@spitfireconstruc	tion.com	
Pue	LIC SPITFIRE USEF		User
		(forever)	
Password	2		
CONFIRM PASSWORD:			-
OLD PASSWORD:			

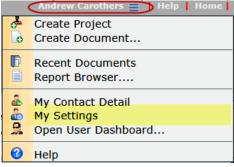
- 2. Type the same password in the **Confirm Password** field.
- Type your old password in the Old Password field. If you do not remember your old password, you will need to see the System Administrator, who is allowed to change passwords without the old password.
- 4. Click to save your change. Both the Password and Old Password fields will be blanked out; your password is not kept in the field for security purposes.

Change Password Pop-Up

You can also change your password on the Change Password pop-up window. This pop-up window opens when you click the \cancel{P} icon. You may see the \cancel{P} icon at the Login screen if your password has expired or will soon expire. You can also access the Change Password pop-up window directly.

To change your password from the Change Password pop-up:

1. Click on your name to open the Site Options menu.



2. Select 🏜 My Settings.

3. Go to the Account tab.

Settings / Preferences	Account	Client Session Information	License Information				
	User ID andy						
USER NAME Andrew Carothers 🔈							
E-MAIL andyc@spitfireconstruction.com							
Password Last Changed: 2014-09-07							
have been a second secon	~~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~				

4. Click 🥂. The Change Password pop-up window will appear.

Change Password	×
OLD PASSWORD:	
NEW PASSWORD:	*
CONFIRM:	*
Change Password	

- 5. Type your **Old Password**, your **New Password** and then **Confirm** your new password.
- 6. Click Change Password then to close the window.

Changing Your Notification Levels

By default, the system is set to notify you, through email, whenever you receive a document with a priority level of High or Urgent in your Inbox. You can choose to change the default for any Doc type so that you receive more notifications or less notifications.

For more information, see page 30.

Suppressing Email Notifications

TIP

Because you will not receive email notifications about documents that were routed to you while you were away, you should check your Spitfire Inbox when you get back. If you know that you will be away for a while and do not want to receive email notifications about documents in your Inbox while you are away, you can choose to suppress email notifications.

To suppress e-mail notifications:

- 1. Go to the Connections tab.
- 2. Click at the Suppress E-mail Notices Until field.

General Address Member Of Connections												
Cell		Joci	· []	✓]/20	14	•	•					
PAGER	Su	Мо	Tu	We	Th	Fr	Sa					
Fax	28	29	30	1	2	3	4					
IM HANDLE	5	6	7	8	9	10	11					
	12	13	14	15	16	17	18					
ORGANIZATIONAL LEVEL	19	20	21	22	23	24	25					
URL	26	27	28	- 29	30	31	1					
SUPPRESS E-MAIL NOTICES UNTIL:					()							

- 3. Select the date on which you want to resume receiving email notifications. For example, if you select tomorrow's date, you will not receive emails today but you will potentially receive email notifications tomorrow.
- 4. Click 💾 to save your changes.

Establishing a Proxy

You can allow other Spitfire users with a specified role to accept or send on a document that was routed to you.

To allow someone else to take action on documents routed to you:

- 1. Go to the Connections tab.
- 2. At the **Allow Route Action Proxy** field, click \checkmark to lookup a role that you can assign as a proxy for you. Anyone with this role will be able to take action on documents routed to you.

Co	onnections	otification Alerts Comments	
< -698	81	PREFERRED CONTACT NUMBER Phone	P
\$		Route via Web	0
69	81	ALLOW ROUTE ACTION PROXY	
Ś	Lookup Dialog		×
<u>}</u>	Available Roles		
4	ROLE NAME	ALL FILTERS	Refresh
	Pick	Role Name 🗟	
<pre>}</pre>		Project Assistant	
<u>}</u>	N	Project Manager	
Ę			

- 3. To remove a proxy, delete the field in order to leave it blank.
- 4. Click 💾 to save your changes.

The Document Options menu on some documents allows you to access details for the source contact of that document. (The source contact for your document changes from document to document and can include vendor companies, subcontractors or other contacts.)

You can open the Contact Detail window for the source contact if the icon appears on the Document Options menu, for example:

S RFQ- In Process			- 0 X					
RFQ: Coho Asphalt and Concrete								
	CUMENT HEADER	(≡)≝I ▲						
	%	Alerts	—					
Doc# 0009	5	Copy this Document						
PROJECT GC-003	&							
DESCRIPTION RFQ: Coho		Concrete View Changes						

To open Contact Details from a document:

- 1. From an appropriate document, click ≡ to open the Document Options menu.
- 2. Click 📥. The Contact Detail window for that Contact will open.

If you have read-only access, you cannot make changes to the Contact's details. You can, however, look up the Contact's general contact information, address and phone numbers.

If you have permission to make changes to the <u>Contacts Detail tabs</u>, see page 15 for information on the General, Address, Member Of, Connections, Notification, Alerts and Comments tabs.

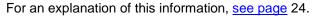
TIP

For more information about documents, see the <u>Focus on Document</u> and Item Basics quide.

Contact Information Cards

You can also access information about a Contact through pop-up Contact Information Cards.

Cor	ntact II	nformatio	on Card	×
С	ontact	Location	Connections	
		NAME	Ken Lathe	
	COMP	ANY NAME	Universal HVAC Specialities	
		TITLE	Project Manager	
	FAMII	LIAR NAME	Ken	
		EMAIL	scyork@spitfiremanagement.com	
	PRIMA	RY PHONE	(914) 273-7263	
			Sé	ÎTFIŘE



Contact Information Card X
Contact Location Connections
CONTACT 2505 33rd AVE NW ADDRESS Seattle, WA 98121
View On Map
Spitter

For an explanation of this information, see page 16.

Cor	ntact In	formatio	n Card		×			
С	PHONE CELL FAX RESPONSIBILITY CUSTOMER ID EMPLOYEE ID		Connections					
		PHONE	(914) 273-726	3				
	Contact Location PHONE CELL FAX RESPONSIBILITY CUSTOMER ID EMPLOYEE ID							
	FAX ((914) 21780	00				
	Contact Location PHONE CELL FAX RESPONSIBILITY CUSTOMER ID EMPLOYEE ID		Subcontractor	Base				
	CUST							
	RESPONSIBILITY Subcontractor Base CUSTOMER ID EMPLOYEE ID							
	PHONE (914) 273-7263 CELL (914) 217-8273 FAX (914) 2178000 RESPONSIBILITY Subcontractor Base CUSTOMER ID							
				S	PITFIRE			

For an explanation of this information, see pages 20 and 25.

Accessing the Contact Information Card

One way to access the Contact Information Card is through the $\frac{1}{2}$ icon. This icon appears after certain fields on documents.

🔄 RFQ- In Pro	cess									
RFQ: Coho Asphalt and Concrete										
DOCUMENT HEADER =										
Doc#	0009									
PROJECT	GC-003		Northern Lights Office Bldg							
DESCRIPTION	RFQ: Coho Asphalt a	and Conc	rete							
	Coho Asphalt and Co	oncrete		<u>A</u>						
VENDOR SUBMITTER	Pat Coho			23						
	, ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~						

The Contact Information Card is also accessed through name links:

• The Source Contact on the Catalog's document or file list.

catalog	contacts		Executive	Hunage	System Admin	00 005							
	_	_	_	_	0	_		_					
	SEARCH												
ate 🔻	Title			Туре	DocN	o Projec	t Project Name	Source Contact					
/23/2014 ₀	Utility Connec	tion Design Cha	inge	Issue	0001	GC-00	3 Northern Lights Office Bldg						
/23/2014	RFQ for 16000	Electrical Bids	, Wingtip Engin	eers RFQ	0001-	0007 GC-50	Northwind Office Building	Wingtip Engineers					
~~~~~	h	~~~~~~	~~~~~~	$\sim\sim\sim\sim$	$\dots$	$\dots$		······					

• The Name on the Contacts list, in both Contacts and Companies view.

Home Catalog <u>Cont</u>	acts	Plan Room	Executive	N
E Contacts		Name		: 
Companies	•	Jack McSwag	:	=
	•	Jason Sunderso		_

Names on certain document tabs.

Details	Scope	Addr	Payees
•	Ve	endor	Ì
/ 🏛	Ke	n Lathe	
~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	$\sim\sim\sim\sim$	~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~

Project Team Contacts

If your Spitfire role gives you permission to see contact information for team members on a project, you will see a Team Contacts part on the Project Dashboard:

GC	GC-003 - Northern Lights Office Bldg 🛛 🛛 🗧 🄀										
DOCUMENTS Z = COMMITMENT - 4 OPEN DOCUMENTS; ALL OVERDUE											
	Туре	0	2	-	(TEAM CONT	ACTS		7	
►	Bid	1	•		o 🕫	Name	Company	Phone	Role	Contact's Project	
►	Bid Package	3			= 🚳	Jack McSwag	Spitfire Construction	(914) 273-0809	Project Manager		
►	Budget	1	1		=	Jason Sunderson	Able Electric Corp	(555) 555-1212	Subcontractor Base	AB0101	
►	ссо	2	2		=	Chris Demo	Spitfire Construction	(203) 952-6552	Superintendent		
▶	Cert & Appr	4	2		=	New Employee			Project Manager		
►	Change Order	1	•		=	Ken Lathe	Universal HVAC Specialities	(914) 273-7263	Subcontractor Base	98273	
►	Commitment	4	4		=	Northern Lights	Northern Lights	(555) 555-1212	Owner	2004-8970	
	Compliance	1			=	Soni York			Project Staff		
Ľ.	Notification	1	1		=	Coho Asphalt and Concrete	Coho Asphalt and Concrete	(555) 555-1212	Subcontractor Base	COHO-2004-098	
►	Correspondence	1	•		=	Elizabeth Keyser-Rubble	Spitfire Construction	(914) 273-0808	Project Assistant		
►	Daily Field Report	1	•		= 🚳	Nick York	York Architects, Inc.	(973) 452-9585	Architect	NT-04-897	
	Drawings	2	2				KEY PERFORMANCE	INDICATORS			

Item Grid View

Columns

TIP

The **ProjectConfig** | **BuildTeam** rule can add certain Contacts automatically to a project. For more information, see the <u>Rules and Rule</u> <u>Values</u> technical white paper. By default, the Project Contacts part displays the following information for team members:

- Name
- Company
- Phone
- Role (within this project)
- **Contact's Project** —usually the Project ID that an outside Contact (for example, a subcontractor, the architect, the lender, etc.) uses for the project. Use this field for cross-references.

Filters

The Team Contacts part offers two filters.

	TEAM CONTACTS =											
	SHOW HIDDE	EN										
MEMBER	RS LIKE							\mathcal{I}				
6	Name	Company	Phone	Role	Contact's Project	Public	Active	Show				
= 🚳	Jack McSwag	Spitfire Construction	(914) 273-0809	Project Manager		×	✓	V				
$\sim\sim\sim\sim$	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	·····	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	\sim	\sim					

- Show Hidden (See page 44.)
- Members Like (<u>See page</u> 46.)

Adding New Team Contacts

Assuming you have permission to do so, you can add one or more Contacts to the Contacts list on a Project Dashboard. For example, you can add team members from another project to this project.

Keep in mind that you are only selecting Contacts from those who are already in your system. If you want to add Contacts who are not yet in your system to your Project Dashboard, you or the System Administrator need to add them to your general Contacts list first. See page 54 for more information.

To add one Contact to your project team list:

- 1. Click to add a new row. The Show column will appear on the part, as will the filters.
- 2. Click the **Show Hidden** checkbox to see if the Contact you want to add is already on the list, but <u>hidden</u> (see page 44).
- 3. Assuming the person is not on the Team Contacts list, click A in the Name field to look up and select a Contact from the main Contacts list (the one that appears on the Contacts Dashboard). Note: alternatively, you can start typing the name of the Contact in the field. Once you type at least three characters, a drop-down list of choices will appear. You can use the arrow keys on the keyboard to select a Contact. The choices indicate Contacts that match your characters in the Name or Email fields.



- (optional) If this Contact has more than one Role, and the role that appears by default is not the one you want on this Project list, click R to select another role.
- 5. (*optional*) If there is project code that this Contact uses in his/her own paperwork and you want to reference it here, enter it in the **Contact's Project** field.
- 6. (*optional*) If you want this Contact to be hidden by default on the Contacts list, click the **Show** checkbox to uncheck it.
- Click ✓ to accept your changes.
- 8. Click 🛗 to save your changes.

To add multiple Contacts to your project team list:

1. Click 🛃 to open the multi-select lookup window.

-		TEAM CONTAC	TS
	Name Company		none Role
Look	sup Dialog	•	3
Acti	ve Contacts for Project Team		
=			Refresh
	PROJECT		Done
= ! 	UserName	Source	External ID 🗟
	A. Datum Corporation	Customer	C010
	Aaron Grant	-	
	Able Electric	Vendor	AB01

- 2. Use the filters to find the Contacts that you want to add to your project.
 - If you want to find all team members on another project, enter the project ID (without masks) in the **On Project** field.
 - Click All Filters to display and use additional filters.

	7772	
	ALL FILTERS	
USER NAME		
TITLE		
EMAIL		
COMPANY		Refresh
ON PROJECT		Done
ADDRESS		Done
CITY		
PRIMARY	~	
SOURCE	~	
COMMON ID		

- Click Refresh to see your filtered results.
- 3. Either click imes to select all the Contacts that appear in the results or click individual Contacts to select them. Once selected, they remain selected until you unselect them.

0

- 4. If necessary, use other filters to find additional Contacts then select them. They will be added to previously selected Contacts.
- 5. Click **Done** to close the lookup window and return to the Contacts list on your Project Dashboard. Your new Contacts will appear on your Team Contacts list.

TIP

Your lookup results automatically omit Contacts who already are on the current project team.

Removing a Team Contact

Removing a Contact from the Team Contact does not remove that person from your system Contacts list (on the Contacts Dashboard). However, it does remove the corresponding project role from that Contact.

To remove a Contact from the Team Contact List:

1. Click \clubsuit to open the Contact Options menu for the Contact whose information you want to view or change.

		TEAM CO	NTACTS
o 🕫	Name	Company	Phon
	Aaron Grant	Grant & Dickenson	Š
1	Edit	fire Construction	(914)
Î	Remove from Team	Electric Corp	(555)
h	Apother Role	mire construction	JERS W

- 2. Click **TREMOVE from Team**.
- 3. Click 💾 to save and remove the Contact from the list.

If you have permission to do so, you can decide which team members will appear on the Team Contacts list by default. Normally, when Contacts are added to a project (by the System Administrator or Manager) they are given the status of **Show**, which means that they will appear on the Team Contacts list. However, if you have the proper permission, you can choose to **Hide** certain team members so they don't appear when you first look at the Contacts list and so that those without permission can never see them. (Hidden team members can be "shown" through a filter.)

To hide Team Contacts:

 Click = then select Show Filter. The Show column (as well as the Public and Active columns) will appear on the Contacts list

		T	EAM CONTA	CTS				C
Мемв	ERS LIKE	HIDDEN						
•	Name	Company	Phone	Role	Contact's Project	Public	Active	Show
=	Aaron Grant	Grant & Dickenson		Consultant		✓	✓	
-	Jack McSwag	Spitfire Construction	(914) 273- 0809	Project Manager		×	✓	
=	Jason Sunderson	Able Electric Corp	(555) 555- 1212	Subcontractor Base	AB0101	✓	✓	
=	Chris Demo	Spitfire Construction	(203) 952- 6552	Superintendent		×	✓	
=	Ken Lathe	Universal HVAC Specialities	(914) 273- 7263	Subcontractor Base	98273	√	√	

 Click the Show checkbox for all team members that you want to hide. The hidden rows will disappear from view.
 Note: Your changes will be saved automatically.

Show vs. Hide Contacts

TIP

For more information about the **PART | Project Member Contact Viewer** role capabilities, see the technical white paper <u>Designing User Roles</u>. To show all Contacts, including hidden Contacts:

1. Either click = then select 🏷 Show Filter

mouse over the **Name** column header to display the drop-down menu.

	TEAM CONTACTS													
6 🖬 🤇	Name		Company		Phone	Role		Hide						
= 🕹	Jack McSv	₿ ⇔	Sort by this column	n	(914) 273-0809	Project Manager		Maximize						
=	Jason Sur	K	Clear this filter		(555) 555-1212	Subcontractor B	¥6	Show Filter						
=	Chris Den		Clear all filters	n	(203) 952-6552	Superintendent		Show Flicer						
=	New Empl			-		Project Manager								
=	Ken Lathe	X	Show Hidden	ecialities	(914) 273-7263	Subcontractor B	ase	98273						
=	Northern			-	(555) 555-1212	Owner		2004-8970						
=	Soni York	16				Project Staff								

2. Click the **Show Hidden** checkbox or option. All team member Contacts will appear on the list.

0 4	Name	Company	Phone	Role	Contact's Project	Public	Active	Show
=	Aaron Grant	Grant & Dickenson		Consultant		1	1	V
= 🕹	Jack McSwag	Spitfire Construction	(914) 273-0809	Project Manager		x	✓	\checkmark
=	Jason Sunderson	Able Electric Corp	(555) 555-1212	Subcontractor Base	AB0101	v	v	\checkmark
=	Chris Demo	Spitfire Construction	(203) 952-6552	Superintendent		x	√	\checkmark
=	William Flint	Spitfire Construction	(757) 555-1212	Project Staff		×	\checkmark	\boxtimes
=	New Employee			Project Manager		\checkmark	\checkmark	\times
=	Ken Lathe	Universal HVAC Specialities	(914) 273-7263	Subcontractor Base	98273	√	√	\checkmark
=	Northern Lights	Northern Lights	(555) 555-1212	Owner	2004-8970	×	\checkmark	\times
=	Soni York			Project Staff		×	√	

- means the person has a status of **Hide**.

Note: changes to the **Show** status of Contacts are in effect for everyone who can access the Contacts part on the Project Dashboard.

Public and Active Statuses

TIP

For more information about the LIST | Maintain Public Contacts and PART | Project Member Contact Viewer role capabilities, see the technical white paper Designing User Roles.

Public vs. Private

-or-

Aside from a Show column, there are Public and Active columns for the Contacts (although these columns are not visible when the filter is off).

A \checkmark in the **Public** column means that the Contact will appear in lookups related to this project. An \times in the Public column means that the Contact record is visible only to those who have override permission.

By default, new Contacts, except for employees, are private (i.e., not Public).

Note: only those with permission can change the Public status of team members.

Active vs. Inactive

A \checkmark in the **Active** column means that the Contact is a current team member for the project. An \times in the Active column means that the Contact is no longer a team member for the project.

Note: only those with permission can change the Active status of team members.

Members Like Filter

Aside from the Show Hidden filter, the Team Contacts part offers the Members Like filter to help you find a specific Contact on the list.

	TEAM CONTACTS
	2
MEMBERS LIKE	Ś

The Members Like filter searches the Name, Company, Role and Phone fields for a match. Leading and trailing wildcards (%) are assumed, for example:

MEMBER	S LIKE dei	mo				
o 🛃	Name	% Com	npany		ione	Role
=			ire Construction	(2	03) 952-6552	Superintendent
Мемвер	RS LIKE Ja					
o 🕫	Name	Ж	Company		Phone	Role
= 🕹	Jack McSwag		Spitfire Construction		(914) 273-0809	Project Manager
=	Jason Sunder	son	Able Electric Corp		(555) 555-1212	Subcontractor Base

If too many results are returned, we recommend you use a longer search term (e.g., **Jac** instead of just **J**).

Edit Grid Information

If you have the proper permission, you can make changes to a Contact's Grid view information.

To make changes in Grid view:

- 1. Click = to open the Contact Options menu for the Contact whose information you want to change.
- 2. Select / Edit.



Seven columns will appear in edit mode (although you will not be able to edit all columns). For example:

+++	Name	Company	Phone	Role	Contact's Project	Public	Active
=	Aaron Grant	Grant & Dickenson		Consultant		✓	✓
×	Jack McSwag	Spitfire Construction	(914) 273- 0809	Project Manager			

Note: if the filter is on (and the Show column appears in Grid view) the Show column will be included in edit mode but you will not be able to change the show status from here.

- 3. Make your changes or additions in the appropriate fields or checkboxes.
- 4. Click \checkmark to accept your changes or \times to cancel them.
- 5. Click 🖾 to save your changes.

Another Role

If a Team Contact needs to be designated with more than one role on the project, you can choose to duplicate the Contact and give the Contact another role.

To give another role to a Team Contact:

- 1. Click = to open the Contact Options menu for the Contact who needs another role designation.
- 2. Select Another Role. A new edit row with the Contact's name will appear.
- 3. Look up a new role for the Contact:

+++	Name	Company	Phone	Role	
√ X	Aaron Grant	· ·	· ·		

- 4. Click \checkmark to accept your changes or \times to cancel them.
- 5. Click 💾 to save your changes.

Contact Details

To access the Contact's Detail view:

- 1. Click = to open the Contact Options menu for the Contact whose information you want to view or change.
- Select Open Detail. The Contact's <u>Detail</u> window will open (see page 14).

To open the Contact's Information Card:

Click the person's name.



Website URL

If a website URL is included in the Contact's information, the choice to edit the link appears on the Contact Options menu.

To edit the Contact's website link:

- 1. Click = to open the Contact Options menu for the Contact whose website you want to access.
- 2. Select **Ste Link**. The following window will appear:

-	×
osite as	sociated
om	\$
the link cann	ot be validated by
	om his team mer

Edit the URL as necessary then click

To open the Contact's website:

Click Solution on the Contact row.



The Contacts Dashboard

The Contacts Dashboard lists Contact information in two views:

- **Contacts** Details for both companies and individuals.
- Companies Details for companies.

			Click	= to show/hid	le the part	or filters.			
Home Catalog <u>Contac</u>	ts Plan Room	Executive Ma	anage System Admin						
177 m i i				CONTACT LIST					Ē
Contacts	NAME			EMAIL					
E Companies	PHONE/FAX			LOCATION					
C	COMPANY			MEMBERS OF		2			
		SPITFIRE USERS	ONLY		CUSTOMER	S ONLY			
			Y						
						5 ONLY			
	Name		Company	Email		Phone	Fax	Туре	Ext ID
	Jack McSwag	=	Spitfire Construction	support@spitfireconstr	ruction.com	(914) 273-0809	(503) 452-6981	Employee	ТИОГ
//>	Jason Sunder	son 🗕	Able Electric Corp	jsunderson@spitfirema	anagement.com	(555) 555-1212	(555) 555-1212	Vendor	AB01
	Chris Demo	=	Spitfire Construction	support@spitfireconst	ruction.com	(203) 952-6552	(503) 452-6981	Employee	DEMO
	William Flint	=	Spitfire Construction	wflint@spitfireconstrue	tion.com	(757) 555-1212		Other	
	Kim Ambercro	ombie 😑	Spitfire Construction	kimab@acme.com				Employee	KIMAB
			Spitfire Construction	jayf@spitfireconstructi				Employee	JFLUEGEL
~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~	~~~~~
Click to add a new Contact.		to view or excontact (shown	dit Contact Details n below).			Click Options	to open tl menu.	he Cont	tact

c	Name		Company		Email			Phone	Fax	Туре	Ext ID
	Jay Fluegel	=	Spitfire Consti		jayf@s						JFLUEGEL
_	CONTACT DETAIL										
ſ	General Address Member Of Connections Notification Comments						Comments				
	CONTACT NAME Jay Fluegel										
	SORT NAME	Fluegel						TYPE	Empl	oyee 🚩 🗗	
	EMAIL	jayf@spit	fireconstructi	on.com				COMPANY			2
ACTIVE      PUBLIC      SPITFIRE USER      MICROSOFT DYNAMICS SL USER     USER LOGIN JFLUEGEL VALID UNTIL: (forever)     ■											
	PASSWORD										
	Confirm Password:			ES		VEND	DR				
	OLD PASSWORD:						EMPLOY	EE JFLUEG	BEL	×	
LOCKED UNTIL: (not locked) 🖩 (no reason)					AC Services,	Inc. 🖌					
			CCOUNT IF UNUSE	D							
	Must Change Password										

## **The Filters**

#### TIP

Wildcards in certain filters A wildcard (%) is assumed after what you type in the Name, Email, Phone/Fax, Location, and Company filters, so, for example, if you type A in the Name field, you will get a list of all Contacts whose name begins with A. In addition, you can use a wildcard before or around text so, if you type %alpine, you would get a list of Contacts that end in alpine and if you type %alpine%, you would find all Contacts with "alpine" in the name.

#### You can filter the Contact list by a variety of criteria:

		CONTACT LIST	
NAME		EMAIL	
PHONE/FAX		LOCATION	
COMPANY		MEMBERS OF	P.
	SPITFIRE USERS ONLY		CUSTOMERS ONLY
	EMPLOYEES ONLY		VENDORS ONLY
	PUBLIC ONLY	ACTIVE	Active V
			Active
			Both
			Inactive

When you change filters, press the **Enter** key to refresh the resulting list.

- Type one or more letters and optional wildcard in the fields:
  - **Name / Email**: returns Contacts with names / emails that match the letter(s) specified.
  - **Phone/Fax**: returns Contacts with a phone, cell or pager number that matches the number(s) specified.
  - Location: returns Contacts with a City or State that matches the letter(s) specified. *City, State* (e.g., Armonk, NY) or *ZIP code* (e.g., 23188) can also be specified.
  - **Company**: returns Contacts associated with companies that match the letter(s) specified.
- Click A at the Members Of field to look up a role by which you want to filter.
- Click one of the checkboxes to filter by Spitfire users, customers, employees, vendors, public contacts, or companies only.
- From the **Active** drop-down list, choose whether to show active contacts, inactive contacts, or both. Active is the default.

#### **In-Column Filtering**

You can click on the **Name**, **Company**, **Email** or **Phone** column headers to display a sort/filter menu, for example:

6	Name	Company		
	Malcolm Sn	Sort by this column	5	
	Trev and Tr	Clear this filter	ıc.	
	Coho Heavy	X Customers Only	ipment	
►	Fabrikam	X Employees Only X Spitfire Users Only		
►	School of F	X Vendors Only	rt -	
•	Proseware	by Nan		mn, type here to filter company column, type ny, etc.

Once you have your filtered results, you can make changes to Contact details or <u>add new contacts</u>, as described starting on page 54.

## The Columns

Contact information is taken from the Contact Detail's <u>General tab</u> (see page 23) and the Company Detail's <u>Address tab</u> (see page 15).

- Name: The name of the Contact (individual or company).
- Company: The company associated with the Contact.
- Email: the email for the Contact.
- **Phone/Fax**: the phone and fax numbers for the Contact.
- **Type**: the type of Contact (Vendor, Customer, Employee, Other).
- Ext ID: the type ID for the Contact (e.g., Employee ID or Vendor ID).

## The Contact Options Menu*

There are up to three options for each Contact, which can be selected from a drop-down menu.

	Chris Demo		oitfire Construction	support@spitfireconst
►	William Flint	×	Merge From	
•	Kim Ambercrombie		View Changes By	
	Jay Fluegel	3	View Changes To	

- Merge From: Click X to merge contact details from this record to another. (See page 64.)
- View Changes By: Click in next to a Contact's name to see what changes this person has made. The Spitfire Change History Exploration and Search Tool (sfChest) will open, listing these changes.

ile	e Options Tools	Help					
-	V				2000+ hit	s from 10/26/10	13:50.
	ChangeWhen	ColName	Info	PriorValue	NewValue	UserName	
	1/28/2011 11:13:32.27	xsfDocHeader.DocMasterKey	Adjustme	(record added)	41D3BD57-08A7-4190	Chris Demo	_
	1/28/2011 11:13:32.27	xsfDocHeader.DocTypeKey	Adjustme	<null></null>	->>Budget	Chris Demo	
	1/28/2011 11:13:32.27	xsfDocHeader.DocNo	Adjustme	<null></null>	0006	Chris Demo	
	1/28/2011 11:13:32.27	xsfDocHeader.Project	Adjustme	<null></null>	GC010	Chris Demo	
	1/28/2011 11:13:32.27	xsfDocHeader.Status	Adjustme	<null></null>	0	Chris Demo	
	1/28/2011 11:13:32.27	xsfDocHeader.Subtype	Adjustme	<null></null>	СО	Chris Demo	
	1/28/2011 11:13:32.27	xsfDocHeader.Title	Adjustme	<null></null>	Adjustments from CO 0	Chris Demo	
	1/28/2011 11:13:27.25	xsfDocSession.LastSave	Green Sp	Jan 28 2011	Jan 28 2011 11:13AM	Chris Demo	-
_							

• View Changes To: Click G to see what changes have been made to this Contact. sfChest will open, listing these changes.

#### TIP

For more information about sfChest, see the technical white paper <u>Viewing Changes</u> <u>through sfChest</u>.

#### Companies View Click = to show/hide the part or filters. Catalog Contacts Plan Room Executive Manage System Admin COMPANY LIST 🛎 Contacts NAME EMAIL Le Companies PHONE/FAX LOCATION VENDORS ONLY CUSTOMERS ONLY ACTIVE Active 🗸 Name Phone Fax Туре Ext ID 0 = (555) 555-1212 (555) 555-1212 Northwind Computers C105 Custome The Phone Company - Kent (555) 555-1212 (555) 555-1212 Customer TI02 = (555) 555-1212 (555) 555-1212 Trey Processing = Customer 0C02 Margie's Travel = (555) 555-1212 (555) 555-1212 PO01 Customer Portland City Power & Light = (555) 555-1212 (555) 555-1212 Custome C055 (555) 555-1212 Ē = (555) 555-1212 Margie and Sons HC01 Vendor Click o to Click b to view or edit add a new Company Details for this Company. company (shown below). Phone Ext ID Name Fax Туре c = (555) 555-1212 Ľ**I**▲ **COMPANY DETAIL**

Address	Attributes	Region	CSI	Comments					
COMPANY	Margie and So	ons				TYPE Vendor	PROJE	CT PURCHASING	
ADDRESS	4905 SW 75t	h				ID HC01		Ð	
Сптү/Sт	Crry/ST Beaverton , OR 97005								
TIME ZONE	Pacific Standa	rd Time (No	rth Ame	erica) - UTC-08	$\checkmark$				
EMAIL						PHONE (555) 5	555-1212	_	
URL	-					Fax (555) 5	555-1212		

## **The Filters**

You can filter the Company list by a variety of criteria:

		COMPANY LIST	=
NAME		EMAIL	
PHONE/FAX		LOCATION	
	CUSTOMERS ONLY		VENDORS ONLY
ACTIVE	Active 🗸		
	Antin		
	Active Both		
	Inactive		
		M/h and the share and filters in sec.	a the Entern line, to refer all the readilities list.

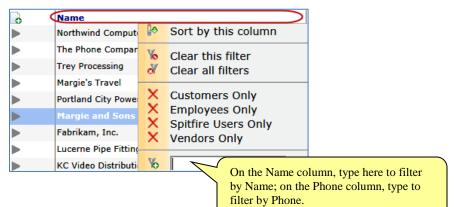
When you change filters, press the Enter key to refresh the resulting list.

- Type one or more letters and optional wildcard in the fields:
  - **Name / Email**: returns Companies with names / emails that match the letter(s) specified.

- **Phone/Fax**: returns Companies with a phone, cell or pager number that matches the number(s) specified.
- Location: returns Companies with a City or State that matches the letter(s) specified. *City, State* (e.g., Armonk, NY) or *ZIP code* (e.g., 23188) can also be specified.
- Click one of the checkboxes to filter by, customers or vendors.,

#### **In-Column Filtering**

You can click on the **Name** or **Phone** column headers to display a sort/filter menu, for example:



Once you have your filtered results, you can make changes to Company details or <u>add new contacts</u>, as described starting on page 54.

## The Columns

Company contact information is taken from the Company Detail's Address tab (see page 15).

- Name: The name of the Company.
- **Phone/Fax**: the phone and fax numbers for the Company.
- **Type**: the type of Contact (Vendor, Customer, Other).
- **Ext ID**: the type ID for the Contact (e.g., Vendor ID).

# **Adding New Contacts**

#### TIP

Spitfire provides stored procedures to synch your Customers, Vendors and Employees (if you are integrated with an accounting system). These stored procedures accomplish two purposes: 1) They create a Spitfire Contact to correspond with your accounting record and 2) They update your Spitfire Contact information when that information is updated in the accounting system.

Contacts—all companies and people you want in your Spitfire system are entered in one of two ways:

- If your site is integrated with an external accounting system (such Microsoft Dynamics SL or Acumatica Cloud ERP), contacts are generally entered into the external system. When the accounting system is synched with sfPMS, this information is automatically added to the Contacts Dashboard. Certain information must henceforth by edited in the accounting system; other Spitfire-specific information can be added and edited in sfPMS. You can also manually add Contacts to sfPMS if you do not want those Contacts to appear in your external accounting system.
- If your site is not integrated, all your contact information must be entered manually at the Contacts Dashboard.

#### Notes:

- Companies are added manually through the Companies view of the Contacts Dashboard.
- Companies have both a Company Detail and a Contact Detail window. When the Company Detail is created for a company, the Contact Detail window is automatically created also.
- As long as there is no ID on a Company Detail for a company, that company is considered a preliminary company (pre-vendor or pre-customer).
- Companies should be added before individuals so that people can be properly linked to companies.
- People are added manually through the Contacts view of the Contacts Dashboard.

# Preliminary Companies

Whether or not your site is integrated with an external accounting system, you can add preliminary companies (for example, pre-vendors) to your general Contacts as needed. If later you want these companies to be full companies in your system, you (if non-integrated) or your accounting system (if integrated) will provide IDs for them.

One reason you might want to add pre-vendors to your system is to be able to add these pre-vendors as routees on Invitation to Bid and /or RFQ documents. Those vendors you end up not wanting to hire can remain pre-vendors, but those you do want to hire would receive IDs and become full Contacts.

# Adding Pre-Vendors

#### To add a preliminary company to your Contacts list:

1. Select the **Companies** list on the Contacts Dashboard.

		COMPANY LIST
Contacts	NAME	EMAIL
Companies	PHONE/FAX	LOCATION
	CUSTOMERS ONLY	Ś
	ACTIVE Active V	}
	Name	Phone
	Northwind Computers :	= (555) 555-1212
	The Phone Company - Kent	= (555) 555-1212

- 2. (*optional*) Use the filters to look for the company to ensure that it does not already exist in your system.
- 3. Click in the Company List area to open a new Company Detail window.
- 4. Select a **Type** for this company—<u>Customer, Vendor or Other</u> (see page 12).
  - If you select Vendor, a Project Purchasing checkbox will appear when you save. Keep this checkbox checked to indicate that this company should appear on lookups on Commitment documents.

TYPE Vendor Vendor PROJECT PURCHASING

- Fill out the desired fields on the Address tab, but leave the ID field blank. (For an explanation of the <u>Address fields</u>, see page 15.)
- 6. Click İ to save your new Company record.
- (optional) Go to the Attributes tab if you want to add attributes for this company. (For an explanation of the <u>Attribute fields</u>, see page 17.)
- (optional) Go to the Region tab if you want to add one or more regions to this company. (For an explanation of <u>Region fields</u>, see page 32.)
- (optional for Vendor companies) Go to the CSI tab if you want to add one or more CSI codes to this company. (For an explanation of <u>CSI fields</u>, see page 22.)
- (optional) Go to the Comments tab if you want to add one or more remarks to this company. (For an explanation of <u>Comments</u> fields, see page 19.)
- 11. Click 🛅 to save your new Company record.

## From Pre-Vendors to Full Contacts

If you have preliminary companies (for example, pre-vendors) in your system, you can choose to convert any of these companies into full companies on your Contacts list.

#### **Integrated Sites**

If you are integrated with an external accounting system, the ID for the company must come from that system.

#### To get the ID from your accounting system:

- 1. Select **Companies** at the Contacts Dashboard to see the Company List.
- 2. Find the company, using the filters if desired.
- 3. Click ▶ to open the Company Detail window for that company.
- 4. At the Address tab, click I next to the ID field.

TYPE Vendor	PROJECT PURCHASING
ID	

- 5. Click OK at the confirmation window that appears. sfPMS will create a Vendor (or Customer) record in the accounting system, and the accounting system will provide an ID for the company (which will appear in the ID field). The information will be automatically saved and your company will be a full Contact.
- (optional) Click I at the ID field to create a <u>Vendor</u> document for the company if the company is a Vendor (see page 70) or a <u>Customer</u> document for this company if the company is a Customer (see page 69).

#### **Non-integrated Sites**

Since all information for companies is added manually if your site is not integrated with an external accounting system, you will need to add the ID for the company yourself.

#### To enter an ID for a company:

- 1. Select **Companies** at the Contacts Dashboard to see the Company List.
- 2. Find the company, using the filters if desired.
- 3. Click be to open the Company Detail window for that company.
- 4. At the Address tab, enter an ID at the **ID** field. You must enter a unique ID for this company.

#### TIP

If the vendor is added manually in your accounting system, you will end up with duplicate records in sfPMS and you will need to merge them. See page 64.

5. Click 🔚 to save your ID. Your company will be a full Contact. 6. (*optional*) Click **I** at the **ID** field to create a Vendor document for the company if the company is a Vendor (see page 70) or a Customer document for this company if the company is a Customer (see page 69). Adding Full Contact Companies Integrated Sites If your site is integrated with an external accounting system, your companies are added when you synch that accounting system with sfPMS. When the information is copied, Company Detail and Contact Detail records are automatically created in Spitfire. For more information, see your Implementer. Non-integrated Sites Instructions for adding a full Contact company (i.e., one that is not a preliminary company) are the same as those for adding a preliminary company (see page 55) with one exception: At the Address tab, enter an ID at the ID field. You must enter a unique ID for this company. After adding a company to your system, you can also create a Vendor or Customer document as desired for Vendor and Customer companies. Click IP at the ID field to create a Vendor or a Customer document for the company (see page 69). Note: Other companies do not have a corresponding Doc type.

# Adding Individuals

#### TIP

If your employees in Microsoft Dynamics SL are also entered as Vendors in order to be reimbursed for travel and expenses, they need Vendor IDs on the **Project Controller** | **Employee and Resources Maintenance** screen in Microsoft Dynamics SL. They will have both an Employee ID and Vendor ID in sfPMS. If your site is not integrated, you must enter individual Contacts (employees of your vendors and customers, your own company's employees, and other people) manually at the Contacts Dashboard. If your site is integrated with an external accounting system, most of your company Contacts will come from that system. However, you can decide to add individual Contacts manually for those people who do not appear in in your accounting system. You can also add employees that appear in your accounting system but were not included in the synch with sfPMS (see page 60).

#### To manually add an individual Contact:

Home Catalog	Contacts Plan Ro	oom Executive	Manage	System Admir	1
					CONTACT LI
Contacts	NAME				EMAIL
Companies	PHONE/FAX				LOCATI
	COMPANY				МЕМВЕ
		SPITFIRE US	ERS ONLY		
		EMPLOYEES (	ONLY		
		PUBLIC ONLY	Y		ACTIVE
25	Name		Compa		Email

- 2. (*optional*) Use the filters to look for the person to ensure that he or she does not already exist in your system.
- 3. Click on the Contact List area to open a new Contact Detail window.
- 4. On the General tab, type the person's name (first and last) in the **Contact Name** field. This information is required.
- 5. Unless you want this person to have a stand-alone record, you must either link your Contact to a company already in your system or designate the person as an employee at your company.
  - If this person is associated with one of your Vendor, Customer or Other companies, click R at the Company field to find and select the correct company.

0	CONTACT DETAIL			
tions	Notification Comments			
	B	TITLE		
		TYPE C	ther	$\sim$
		COMPANY		
	<b>\</b>			U
_	p Dialog	_	_	3
Conta	act Companies			
	ALL FILTERS		R	lefresh
COM	PANY			
Pick	Company	Туре	ID	City 🗟
	Northwind Computers	С	C105	Portland
	The Phone Company - Kent	С	TI02	Kent
<b>V</b>	Trey Processing	С	OC02	Salem
<u> </u>	Margie's Travel	с	PO01	Portland
		С	C055	Portland
$\checkmark$	Portland City Power & Light			
	Portland City Power & Light Margie and Sons	v	HC01	Beaverton

The company's Type will appear as this Contact's Type.

• If this person is an employee at your company, enter a unique Employee ID at the **Employee** field.

(*optional*) If your employee is reimbursed through Accounts Payable and therefore needs a Vendor ID, enter a unique Vendor ID at the Vendor field. **Note**: if your site is integrated with an external accounting system, <u>see page</u> 60. 6. (*optional*) If this Contact is to be a Spitfire User (i.e., someone who can log in to Spitfire), click on the **Spitfire User** checkbox to check it. The User Login field will appear.

#### TIP

For more information about the SYS | Grant Contacts ability to log into the system role capabilities, see the technical white paper <u>Designing User Roles</u>.

#### TIP

Selecting the Spitfire User option will automatically assign the role of **Everyone** to the Contact. The **Everyone** role is very limited. You may want to add other roles to the user at the Member Of tab (see page 26).

<b>Note</b> : you must have the proper role capability in order to make
a Contact a Spitfire user.

				CONTACT DETAIL						
General	General Address Member Of Connections Notif									
Contact Name Soni York										
SORT	NAME York									
EMAIL										
USER			VALID UNTIL: (for	ever) 📧						
Pase	WORD		l							
	WORD:		NEVER EXPIRES							
~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~						

- Enter a unique login at the User Login field.
- Enter a password for this user at the **Password** field and again at the **Confirm Password** field.
- 7. Fill out other desired fields on the General tab. (For an explanation of the <u>General fields</u>, see page 23.)
- 8. Go to the Address tab and decide if you want the address for this Contact to be same as the address from the linked company.
 - Keep the Use Address... checkbox checked if you want to use the company's address.
 - Click the **Use Address...** checkbox to uncheck it if you want to enter a different address for this Contact.
- 9. Fill out the **Salutation** and **Familiar Name** fields if desired. (For an explanation of the <u>Address fields</u>, see page 15.)
- (optional) Go to the Member Of tab if you want to assign a role to this Contact. (For an explanation of roles on the <u>Member Of tab</u>, see page 26.)
- (optional) Go to the Connections tab if you want to enter connections and routing information for this Contact. (For an explanation of <u>Connections fields</u>, see page 20.)
- (optional) Go to the Notification tab if you want to change the notification level for certain Doc types. (For an explanation of <u>Notifications</u>, see page 30.)
- (optional) Go to the Comments tab if you want to add one or more remarks to this Contact. (For an explanation of <u>Comments</u> fields, see page 19.)
- 14. Click 💾 to save the Contact record..

Adding Unmapped Employees

When Spitfire is implemented and if your site is integrated with an external accounting system, you have the choice of automatically synching all employees at your company or just certain employees. Employees who are not yet in sfPMS are considered unmapped employees. You can choose to add them individually to sfPMS as needed.

To add an unmapped employee to sfPMS:

- 1. Select the **Contacts** list on the Contacts Dashboard.
- 2. (*optional*) Use the filters to look for the person to ensure that he or she does not already exist in your system. Consider that the person may be in the system under a slightly different name (e.g., Bill Walsh vs. William Walsh).
- 3. Click on the Contact List area to open a new Contact Detail window.
- 4. Click A at the Employee field to find and select an unmapped employee. Use the filters as desired.

Lookup Dial	og	VENDO		/ Employee ID			
Unmapped	Active Employ	/ees					
ALL FILTERS Refresh							
EmpID	Name	Department	City	LastPaidDate			
ABARR	Adam Barr						
AGREEN	Alan Green	FIELD	Portland	6/14/2004			
ASTEINER	Alan Steiner						
ARECKER	Amy Recker			4/19/2004			
ABLACK	Andy Black	FIELD	Portland	6/14/2004			
BPOTTER	Barry Potter		Portland	4/2/2004			
BSMITH	Ben Smith			4/19/2004			

The person's Name, Vendor ID, Employee ID, and Division ID will fill in automatically.

- 5. (*optional*) Click Type field to create an Employee document for this person (see page 68).
- 6. Continue to <u>fill out the Contact Detail window</u> as you would with any other new Contact (see page 59).

Updating Contacts

Integrated Sites vs. Nonintegrated Sites

> If your site is integrated with an external accounting system such as Microsoft Dynamics SL or Acumatica Cloud ERP, the data source for your Contacts with a Type of Customer, Vendor, or Employee is the accounting system. As you update the data in your accounting system, the synchronization process will automatically update your Spitfire Contact records for these customers, vendors and employees.

However, not all the data in the Spitfire Contact record is populated from the accounting system. For example, the Spitfire password and the vendor's compliance items are entered directly in Spitfire, whether or not the Contact is synched with an accounting system.

On the other hand, on non-integrated sites, all the data is entered and maintained in sfPMS.

Editing Companies

TIP

If a blank field does not allow you to enter data (for example, Email); this could be because your site is integrated and the field is blank in your accounting system. To enter data is this field, vou must enter it in the accounting system and Spitfire will then synch the data. Likewise, if you cannot blank out a field, it is because you must edit the field in your accounting system.

To edit a Company in sfPMS:

- 1. Select the Companies list on the Contacts Dashboard.
- 2. (*optional*) Use the filters to look for the company that you want to update.
- Click ► to open the Company Detail window. Most changes on the company level are made on the Company Detail window. These changes will affect all Contact records that are linked to this company record. (See the chapter on page 15 for an explanation of <u>the tabs on the Company Detail</u> window.)
- 4. Make your changes then click 🛅 to save them.

Editing Individual Contacts

To edit a Contact in sfPMS:

- 1. Select the **Contacts** list on the Contacts Dashboard.
- 2. (*optional*) Use the filters to look for the person you want to update.
- Click ▶ to open the Contact Detail window. (See the chapter on page 15 for an explanation of <u>the tabs on the Contact Detail</u> window.)
- 4. Make your changes then click 💾 to save them.

Unlinking Contacts from Companies

One of the changes you may need to make to an individual Contact is to sever the connection between that person and the company to which that person was linked.

To unlink a person from a company:

- 1. Open the Contact Detail window for the person as described above.
- 2. On the General tab, blank out the **Company** field.

ξc	CONTACT DETAIL							
۶ <mark>۴</mark>	Connections	Notification	Comments					
ç <mark>rs</mark>	I.	TITLE						
şrs	S Type Customer 🗹 🕞							
\sum		COMPANY North	wind Computers	\supset				

3. Click to save your change. The Contact will no longer be associated with the company. However, the company address will remain as the Contact address until you change it.

Note: Once the **Company** field is clear, you can choose to link the Contact to a different company by clicking $\cancel{2}$ to look up and select a different company. If you want the address of the new company to be the Contact's address:

• On the Address tab, click the **Use Address...** checkbox to check it then click to save.

Removing and Merging Contacts

Deleting vs. Deactivating Contacts

Once a Contact has done something (e.g., created or edited a document, subscribed to Alerts, etc.) or has been referenced (e.g., made a routee, attendee, responsible party, source contact, etc. on a document), that Contact cannot be deleted. In addition, Contacts that are synched with an external accounting system (if your site is integrated) cannot be deleted in sfPMS. However, when you can't delete a Contact from sfPMS, you can deactivate the Contact. Inactive Contacts cannot log on to Spitfire and do not show up on lookups.

Note: if the Contact is a contact in your accounting system, you will need to deactivate it in the accounting system first.

Deleting Contacts

You can tell that a Contact *can* be deleted (and that you are allowed to delete the Contact) if the \widehat{III} icon appears on its row on the Contacts Dashboard:

0	Name		Company	ì
	Aaron Grant	=	Grant & Dickenson	1
	Northwind Computers	=	Northwind Computers	3
	Jack McSwag	=	Spitfire Construction	100
	The Phone Company - Kent	=	The Phone Company - Kent	
	Kris Johnson	=	Active Electric	į
\sim	monter	\sim	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	Ş

To delete a deletable Contact:

- 1. On the Contacts Dashboard, select the **Contacts** view (for an individual or company) or the **Companies** view (for a company).
- 2. (*optional*) Use the <u>filters</u> (described on page 50) to find the Contact you want to modify.
- 3. Click III at the Contact you want to remove from sfPMS.

Deactivating Contacts

When you deactivate a Contact, history for that Contact will remain in sfPMS.

To make a non-synched Contact inactive:

 On the Contacts Dashboard, select the Contacts view. Note: while companies can be found in both the Contacts and Companies view, you can deactivate a company only from the Contacts view.

- 2. (*optional*) Use the <u>filters</u> (described on page 50) on the Contact List to find the Contact you want to modify.
- 3. Click b to open the Contact Detail window for the Contact.
- 4. Click on the Active checkbox on the General tab to uncheck it.

General	Address	Member Of	Connection						
Contact Name Kris Johnson Sort Name Kris Johnson									
EMAIL krjohnson@ssresources.com									

5. Click 💾 to save your change.

Merging Two Contact Records

If you end up with two Contact records for the same person or company and you can't delete either one of them, you can merge the Customer, Vendor or Employee ID from one Contact record into the other in order to consolidate the audit trails, Alert Subscriptions, comments, routing, and names for both Contacts. You may also be able to use the merge feature to consolidate unwanted Contacts into one specially created Contact record.

Example

Similar names and identical e-mails indicate that the Contact records shown below and on the next page are for the same person. However, since both "Kim Akers" and "Kimberly Akers" have been used in the system, neither can be deleted. You decide to merge them. First, you compare the two Contact Detail windows to determine which Contact should be merged into which Contact. The Contact Name of the "to" Contact will remain; the other will eventually be deleted.

_	CONTACT DETAIL						
	General	Address	Member O	f Connection	s Notification	Comments	
	CONTACT N	IAME Kim Ake	ers	L	TITLE		
	SORT N	IAME Akers			Түре	Employee 🗹 🗗	
	E	MAIL kima@a	cme.com		COMPANY		2
			PUBLIC DYNAMICS SL U				
	User Lo Passw	VALID UNT	IL: (forever)				
	Con			NEVER EXPIRES	VENDOR		
	OLD PASSWO	DRD:			EMPLOYEE KAKERS		
General	Address	Mem	ber Of	Connections	Notification	Comments	
0	Added			Ву	Remark		

Contact Record A:

Notice that Kim Akers has no comments.

Contact Rec	ord	B:
-------------	-----	----

			CONT	ACT DETAIL				
	General Ac	ddress Memb	er Of Conne	ctions N	lotification	Comments		
		Kimberly Akers			т			
	SORT NAME	Akers				Type Other	\sim	
	EMAIL	kima@acme.cor	n		COMPAN	Y	R	
	ACTIVE DUBLIC SPITFIRE USER MICROSOFT							
General	Address	Member Of	Connectio	ns Not	tification	Comments		
ò	Added	Ву		Remark				
/ 🏛	seconds ago _o	Chris	Demo	Travels to	NYC on week	ends.		
/ 🗊	seconds ago _o	Chris	Demo	Promoted 1	today.			

Notice that Kimberly Akers has two comments.

You decide that Kim Akers should remain in the system (because that record is integrated with Microsoft Dynamics SL) so you merge information from Contact Record B (Kimberly Akers) into Contact Record A (Kim Akers) as described below to end up with the following:

				CONTACT DE	TAIL		84
	General	Address	Member Of	Connections	Notification	Comments	
	CONTACT	Name Kim A	kers		TITLE		
	SORT	NAME Akers			Туре	Employee 🖌 🕞	
		EMAIL kima	Dacme.com		COMPANY		2
	☑ ACTIVE ☑ PUBLIC ☑ SPITFIRE USER ☑ MICROSOFT DYNAMICS SL USER						
	User	LOGIN KIMA VALID U	NTIL: (forever)				
	Pass	SWORD					
		WORD:		NEVER EXPIRES	VENDOR		
	OLD PASS	WORD:			EMPLOYEE KAKERS	;	
eneral	Addre	ess M	ember Of	Connections	Notification	Comments	
3	Added		Ву	Re	mark		
Û	seconds a	go _o	Chris Dem	no Tra	vels to NYC on we	ekends.	
Ŵ	seconds a	goo	Chris Dem	no Pro	moted today.		

Now Kim Akers has the two comments.

TIP

Changed your mind? You can choose expand the Contact and click X to "undo" the procedure.

To merge two Contacts:

- 1. On the Contacts Dashboard, find the Contact you want to merge "from". This record will eventually be discarded.
- 2. Click = at the Contact row, then select $\stackrel{\scriptstyle \ensuremath{\mathsf{M}}}{\xrightarrow{\scriptstyle}}$ Merge From.
- 3. Find the Contact that you want to merge "to" and click = to open the options menu for that Contact.
- 4. Select **Merge Into**. The "from" Contact will seem to disappear from the list, leaving only the merged Contact In reality, the "from" Contact will have been made inactive.

То	delete	an	inactive	Contact	after	а	merg	e:
----	--------	----	----------	---------	-------	---	------	----

1.	Select Inactive as the filter for the Contact List:	
	CONTACT LIST	3
		\rightarrow

				CONTACT	LIST	5
NAME						2
EMAIL						Ś
PHON	E/FAX					5
LOCAT	TION					22
Сомр	ANY					3
МЕМВ	ERS OF			2		Ś
			USE	RS ONLY		>
						2
		EMPLOYEI	ES C	ONLY		3
		VENDORS	ON	LY		3
			NLY			2
ΑCTIV	Έ	Inactive 🗸				~~~~
0	Name			Company	Email	
•	University M	echanical	=			
▶ 🗊	Kimberly Ake	ers	=		kima@acme.com	Ì

2. Click \widehat{III} to delete those Contact records from sfPMS.

Associated Documents

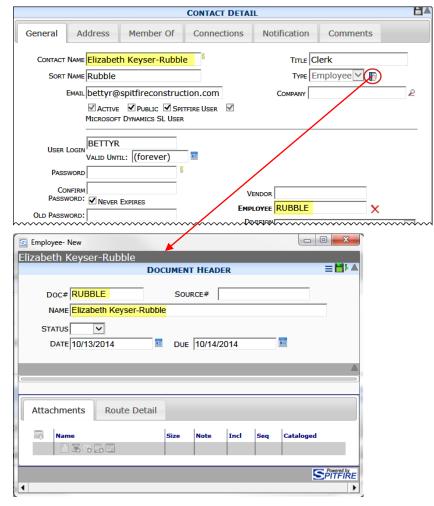
TIP

For more information about these documents, see the <u>Focus on Doc</u> <u>Types and Project</u> <u>Workflow</u> guide.

> Employee Document

When you add a company with a Type of **Customer** or **Vendor** or when you add an **Employee**, an associated empty Spitfire document is also created. Because all Spitfire documents support Attachments (scanned or uploaded files), Alerts and Routing, you can, for example, add a link to the Customer's website on the Attachment tab, route the Vendor document to your AP Department to have them fill in the Vendor's credit application, or set an Alert for your employee's annual review. In addition to supporting these basic functions, the Vendor document supports Compliance items. (See the *Focus on Alerts and Compliance* guide for more information on setting up Compliance.)

When you first open an Employee document from a Contact Detail window, the **Doc #** and **Name** fields on the Employee document will be populated automatically.



The Employee document is used mostly for Alerts, Attachments, and Routing.

• Save the document to enable the Attachment options.

TIP

The Alert option (found on the Options menu) is described in the <u>Focus</u> <u>on Alerts and</u> <u>Compliance</u> guide.

Attachments are described in the <u>Focus</u> <u>on Files, Attachments</u> <u>and the Catalog</u> <u>Dashboard</u> guide.

Route Detail is described in the *Focus on Routes* guide.

Customer Document

When you first open a Customer document from a Customer Company or Contact Detail window, the **Cust #** and **Description** fields will be filled in automatically.

			CONTACT DETAIL			84
General	Address	Member Of	Connections	Notification	Comments	
CONTACT	NAME Margie's	Travel		TITLE		
	NAME Margie's			Ţ	PE Customer 🗠	
E	MAIL				argie's Travel	
	Active Dynamics			OSOFT		
USER L	.OGIN (never a:	ssigned)		CUSTOMER	2001	
~~~~ <b>P~~</b> ~	wol	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	h~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~
🔄 Customer-Ad	tive					
Margie's Tr		_				
nurgie 5 m			DOCUMENT HEAD	ER		= 🖽
CUST #	PO01					
DESCRIPTION	Margie's Trav	el				
		0				
STATUS	Active 🗸	U				
Notes	Addr					
	NOTES	5				/
						-
	Added		⁴ By	Remark		
o	Added		Dy	Kentark		
	1					
Attachme	nts Rout	e Detail				
_			1 1	1 1	1	
Rar Nar			Size Note	Incl Seq	-	
	) 🌫 🖂 🚉 📴	2			₽	
						SPITFI

# TIP

The Document Options menu and the midsection tabs (Notes and Addr) on a document are described in the <u>Focus</u> <u>on Document and Item</u> <u>Basics</u> guide.

# Vendor Document

When you first open a Vendor document from a Vendor Company or Contact Detail window, the **Doc #** and **Description** fields will be filled in automatically.

			CONTACT DETAI	L	
General	Address	Member Of	Connections	Notification	Comments
CONTACT	NAME Margie	and Sons		TITLE	
	NAME Margie			Т	vpe Vendor
	EMAIL			COMPANY Ma	argie and Sons
	ACTIVE DYNAMICS		ITFIRE USER 🗌 MIC	ROSOFT	
USER	LOGIN ( never a	ssigned )			
Pass	SWORD			Vendor I	HC01
	~~~~~	~~~~~~			
S Vendor- Op Margie and			×		
Margie and	1 30115	D	OCUMENT HEADE	R	≡≝⊾
					_
	HC01		SOURCE#		
	Margie and S				
	Open 🔽 🛈				
DATE	02/02/2010	DUE	02/02/2010		
Details	Info C	ontacts Con	npliance		•
	Түр	Subcontracto			\checkmark
	PAY CONTRO	L Auto			\checkmark
	BOND LIMI	т	0.00		
	EMPLOYEE				
	YEAR	s	0		
		Rating 85			
1					
Attachm	ents Rout	e Detail			
Nar P	ne] 🌫 🖂 🔜 🕎	I	Size Note	Item Incl Se	q Cataloged
					SPITTFIRE
4					•

Mid-section Tabs

Details

Details Info	Contacts Compliance	
Түре	Subcontractor	~
PAY CONTROL	Auto	\checkmark
BOND LIMIT	0.00	
EMPLOYEES		
YEARS	0	
	Rating 85	

Select the type of Vendor from the **Type** drop-down.

- If you have set up Compliance for your site (as described in the <u>Focus on Alerts and Compliance</u> guide) you can set **Pay Control** to Block, Warn or Auto for this Vendor.
- The **Bond Limit**, **Employees**, and **Years** fields are informational only.
- Rating is used to rate how much you like working with this Vendor. 100 is the highest number you can use; 0 is reserved for "unqualified" vendors. You can also use negative numbers to indicate "unacceptable" vendors. Rating is used on some reports and also as a filter on the Vendor lookup window:

Lookup Dialog		x]
Project Vende	rs	-
	ALL FILTERS	
COMPANY		
VENDOR ID		
CITY		
STATE		
ZIP		
CSI		
RATING		
		~ ~

Info

Details Info	Contacts	Comp	liance		
INFO					
CURRENT PROJECTS				/	
PAST PROJECTS				/	
o Added	B	ξ γ	Rema rk		

• Enter notes in the Info, Current Projects, and Past Projects fields as desired.

Contacts



- Click then A to look up and select a Contact to include on this list.
- Click dent of the contracts and the set of

Compliance

Deta	ail	s	Info	Contact	s Co	mpliance		
		ок	Туре		Required	Received	Notify	Track
► 1	Ì	~	General Liabil	ity Insurance	unspecified		✓	<
▶ 1	Ì	√	Automobile In	s	unspecified		<	✓
) م	Î	√	Bond		unspecified		✓	<
6			General Liabi	lity 🗸				

For information about the Compliance tab, see the <u>Focus on Alerts and</u> <u>Compliance</u> guide.

Associated Manage Dashboard Tools

Users with access to the Manage Dashboard can edit the CSI codes and Regions that are used in the Company Detail windows.

CSI Maintenance

Most of your CSI Codes are added to sfPMS during the implementation stage. However, you can add other CSI Codes and edit the existing codes as needed.

Home	Catalog	Conta	icts	Plan Room	Executive	Manage	System Admi	n GC-003					
				CSI MAINTENANCE									
Route	es				CODE :								
Alloca	ations			DESC	RIPTION :								
Alert	Subscripti	ons	c	CSI Code		1 Descripti	on		Extended Descriptio	n	Auto	Active	
	pliance Typ		/ 🏛	00000		Project Ad	ministration				x	1	
	Maintenan	ce	/ 🏛	01000		General Co	onditions				×	v	
Date			/ 1	01010		General C	ontractors				×	1	
Progr Refer			√ X	01011		Subcontrac	tors			1			
Regio	nonce Do-Mainter	-9206		01012	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	Constructi	on/Project Manage	nent		~~~~~~	×	1 Jane	

CSI codes are assigned to companies through the <u>CSI tab</u> on the Company Detail window. See page 22.

For more information about the CSI Maintenance tool, see the <u>Focus on</u> <u>the Manage Dashboard</u> guide.

Region Maintenance

You can define and edit regions however you want. For example, you can set up area codes, ZIP codes, geographical regions or home-grown variations of these as your "regions."

Home Catal	log C	ontac	ts	Plan Room	Executive	Manage	System Admin	GC-003		
						Έ	8			
Routes					ID :					
Allocations				DESC	RIPTION :	,				
Alert Subsc			d	Re	gion ID			1 De	escription	
Compliance	e Types	5 /		MA				Mid	d-Atlantic	
CSI Mainter		1	m	NE				No	rtheast	
Date Types		1	Î	PC				Pa	cific Coast	
Programs		1	Ŵ	SE				So	utheast	
Reference			× V	SW	1	_		So	outhwest	
Region Main		ice –		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~~	~~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~

Regions are assigned to companies through the <u>Region tab</u> on the Company Detail window. See page 32.

For more information about the Region Maintenance tool, see the *Focus* on the Manage Dashboard guide.