Focus Guide

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

Version 4.5

Revision Number: 4.5.12.12.2014

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About Our Documentation

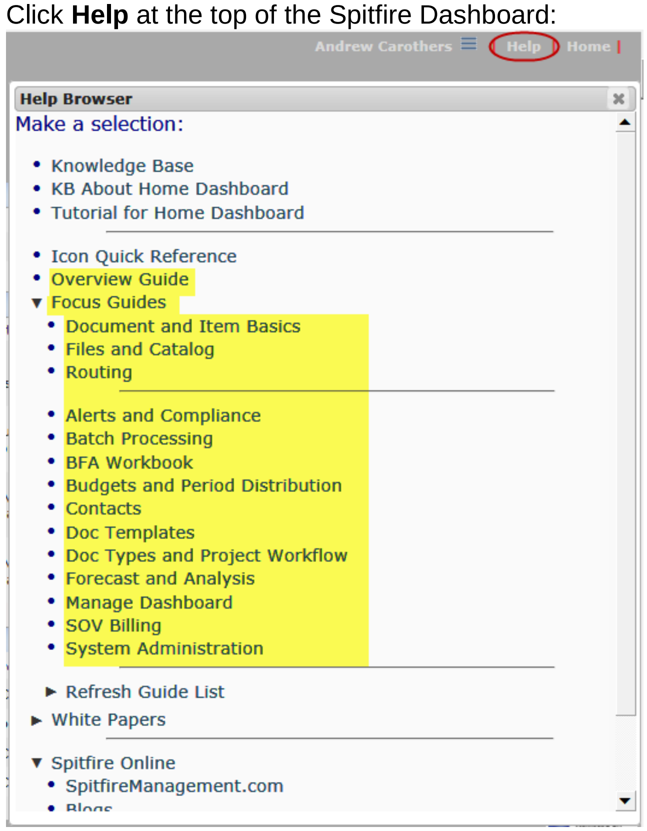
The Spitfire Project Management System (sfPMS) is extensive and powerful. Learning about all that you can do with it takes time. To help you learn, we provide various forms of documentation. Because one large all-inclusive manual would be too unwieldy and take too long to download, we provide smaller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

Guides

Our guides, which include an *Overview Guide* 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 *Overview Guide* 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:

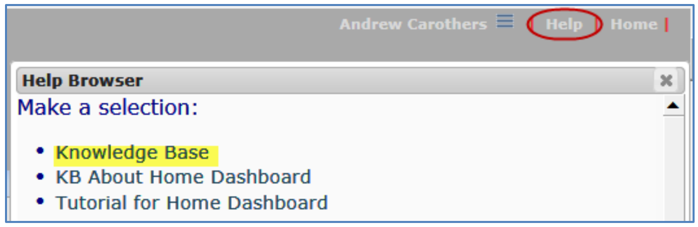


3. Select either **Overview Guide** or one of the choices under **Focus Guides**:

   The guide will appear as a PDF file.

The Knowledge Base

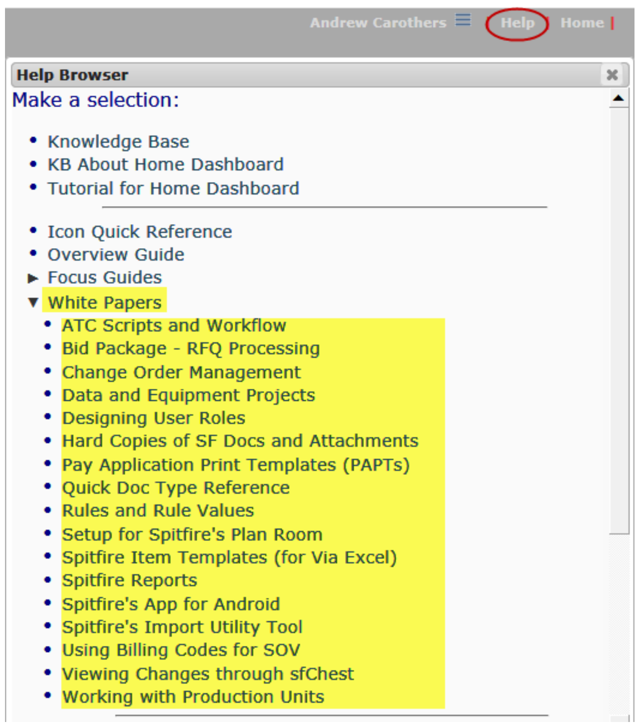
The Knowledgebase contains articles, in a question-and-answer format, that cover either more specific or more technical information about sfPMS. The Knowledgebase is accessed through the same Help menu as the guides:



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:



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 *Overview Guide* and *Focus on Documents and Item Basics*, 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.

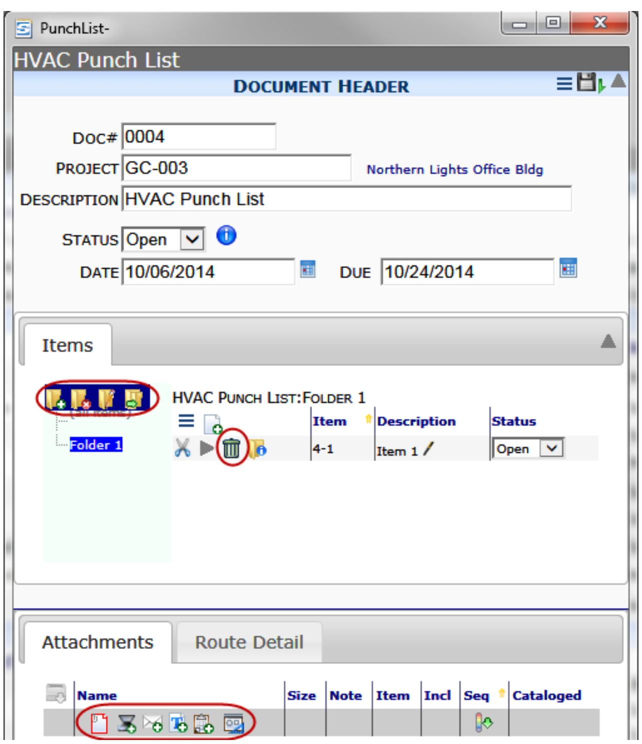
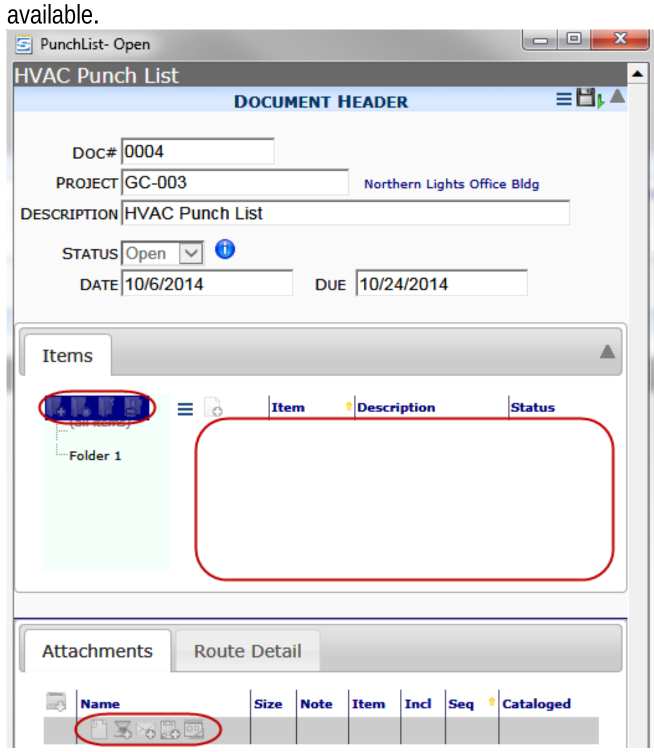
A role has two functions:

- 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.

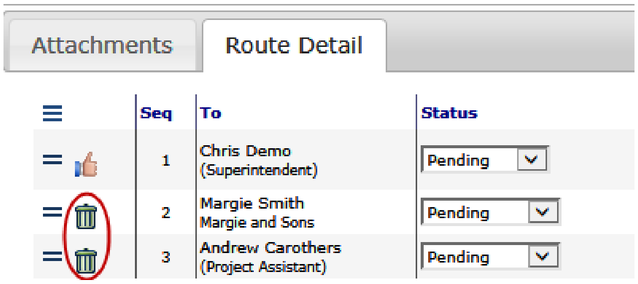
From your perspective, roles often correspond to job titles. Some examples of Spitfire roles are Project Lead, Architect, Supervisor, Project Assistant, System Manager, etc. All Spitfire users are automatically given the role of **Everyone**.

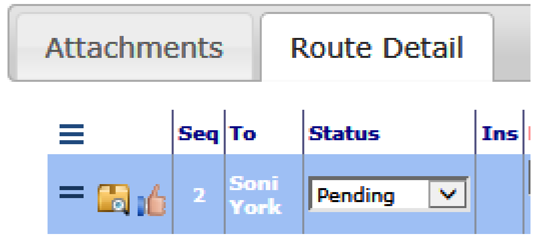
Capabilities

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.
	

<table>
<tr><th>Full Access Rights</th><th>Minimum Access Rights</th></tr>
<tr><td>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.


</td><td>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.


</td></tr>
</table>

Responsibilities

TIP
More information about roles is available in the technical white paper *Designing User Roles* and the *Focus on System Administration* guide.

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.

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

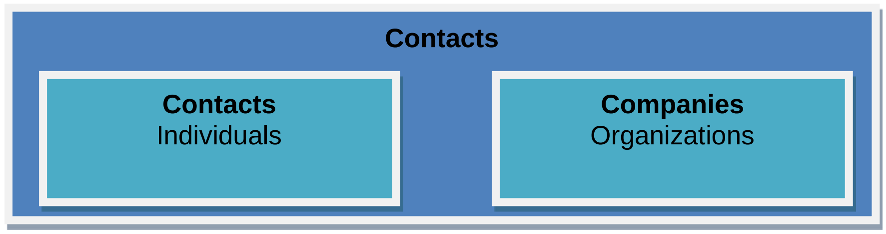
So Chris Demo and John Smith can see all other Contacts but William Flint can see John Smith but not Chris Demo based on Organizational levels.

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 public 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.)

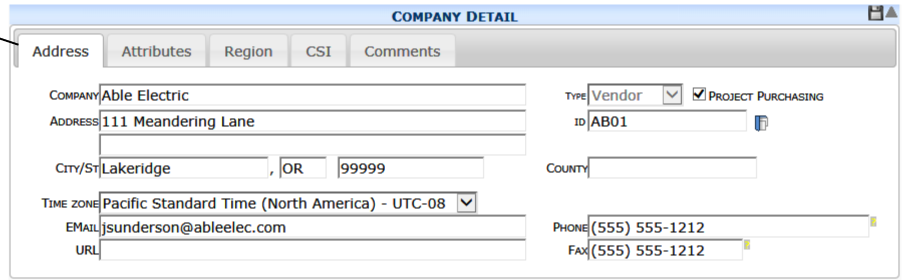
Detail Information

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 Contacts Dashboard (see page 49).

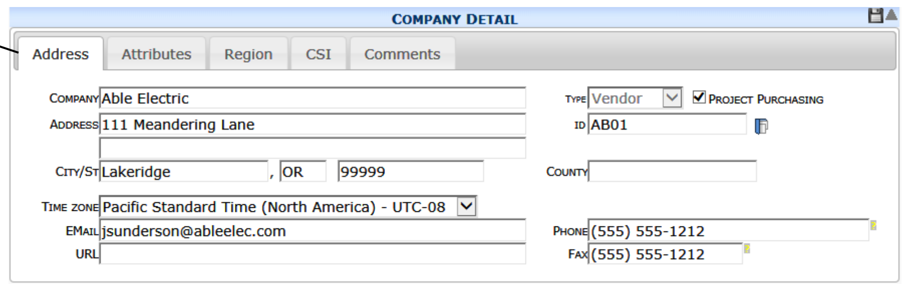
Company Detail

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

Vendor Company



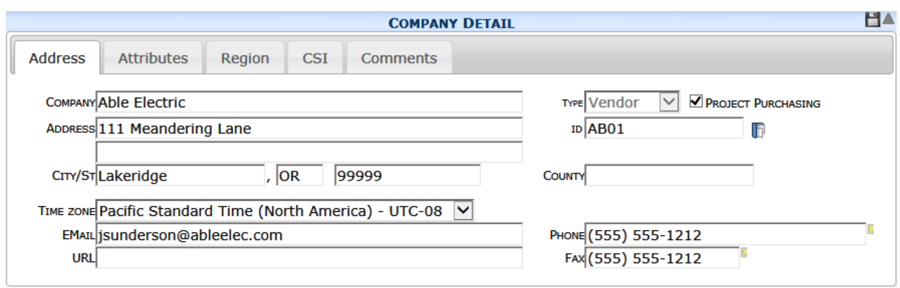
Customer Company



For a description of the fields 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.



For a description of the fields 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 Project Dashboard (see page 41) and certain document drop-down menus (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:

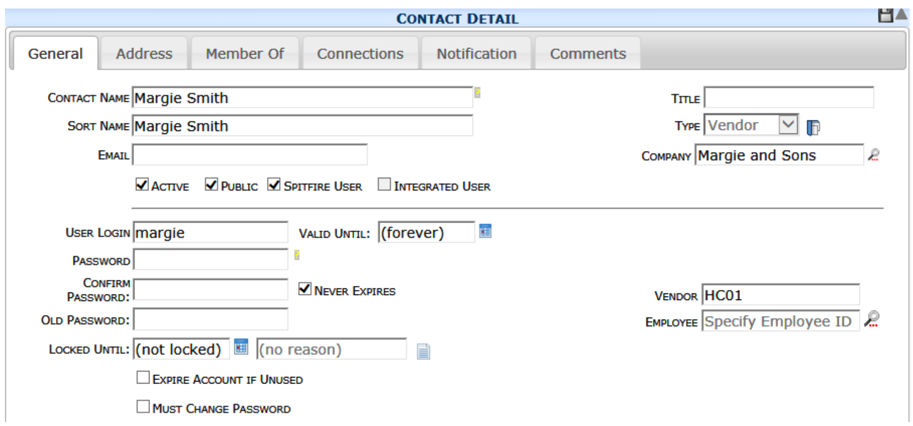
- **Customer**: people who are linked to Customer companies.
- **Vendor**: people who are linked to Vendor companies.
- **Other**: people who are linked to Other companies.
- **Employee:** people who work at your company.

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.



For a description of the fields 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 user preferences (see page 34), the Contacts part on a Project Dashboard (see page 41) and certain document drop-down menus (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

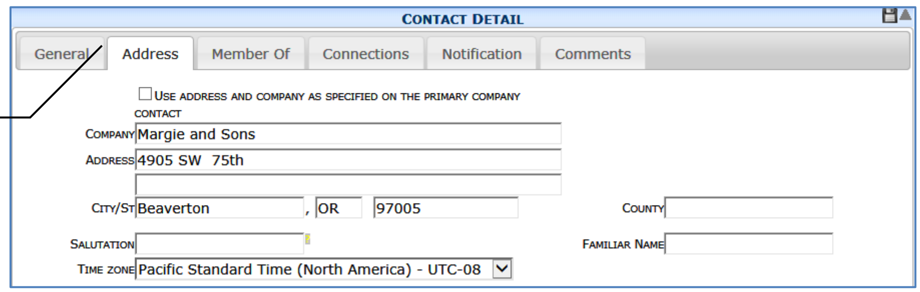
Depending on your permission level and from where you access the Contact Details for a person or company (see page 34), you may see any of the following tabs with some or all of the described fields. The Company Details window displays its own tabs, also described below.

Address Tab

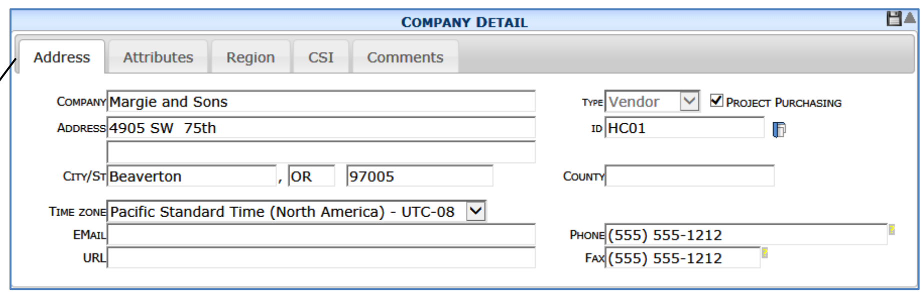
The Address tab is available

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

Example of the Address tab on a full access Contact Detail window.



Example of the Address tab on a Company Detail window.



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.

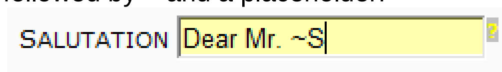
Possible Fields

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:

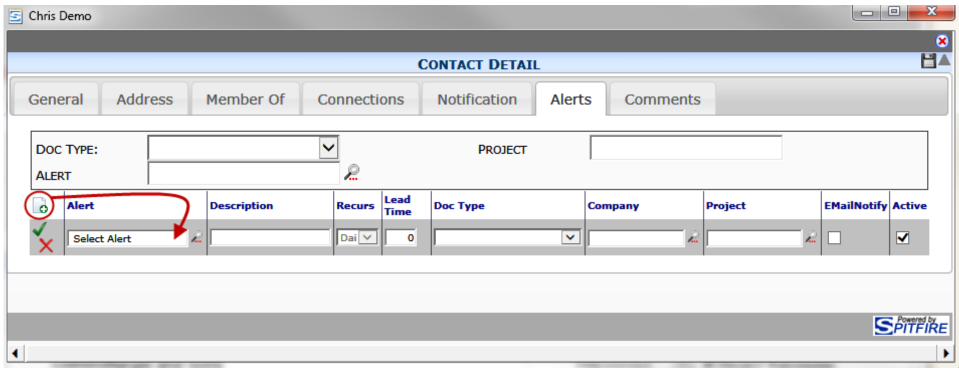
  - **~U** is replaced by Contact Name (e.g., *Dear* John Smith)
  - **~F** is replaced by Familiar Name (e.g., *Dear* Jack)
  - **~S** is replaced by Sort Name (e.g., *Dear Mr.* Smith)
  - **~C** is replaced by Company Name (e.g., *Dear* S & S)
  - **~T** is replaced by Title (e.g., *Dear Mr.* President)
  - **~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 ☑, 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.
- **:** 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.



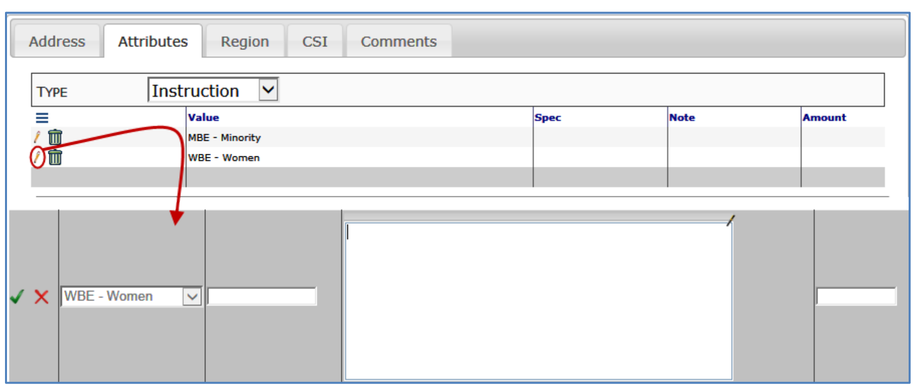
A thorough explanation of Alerts and Alert Subscriptions can be found in the *Focus on Alerts and Compliance* guide.

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

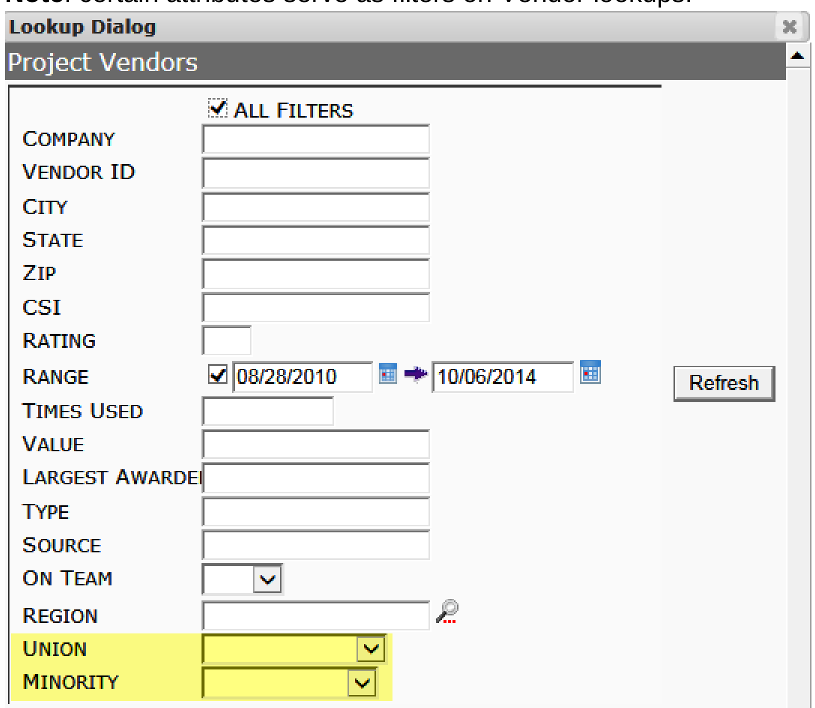


Fields

TIP
For more information about the Code Maintenance tool, see the *Focus on System Administration* guide.

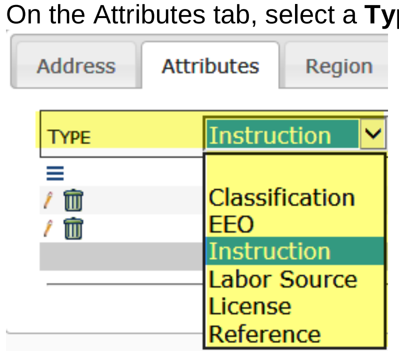
- **Type** *(drop-down)***:** a filter on attribute type. The Type drop-down displays choices set up through the AttrType code for Vendors in the Code Maintenance tool. If no Type is selected, all attributes for the company will be listed.
- **Type:** (*column*) the attribute type for the attribute. 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:



To add a new attribute value:

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



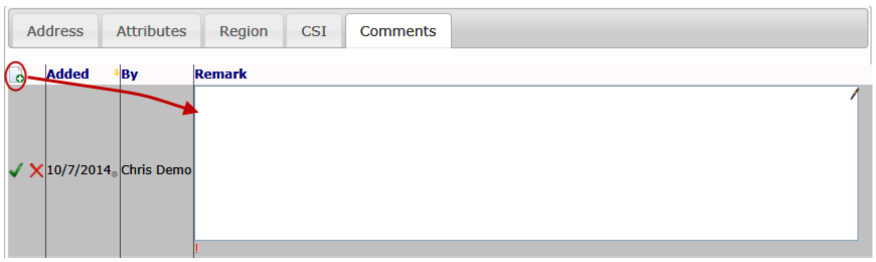
2. Click ≡ to open the Options menu then select **Add New**.
3. Select a **Value**.
4. Enter a **Spec**, **Note** and/or **Amount** as appropriate.
5. Click ✓ to accept your changes and to save them.

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



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.

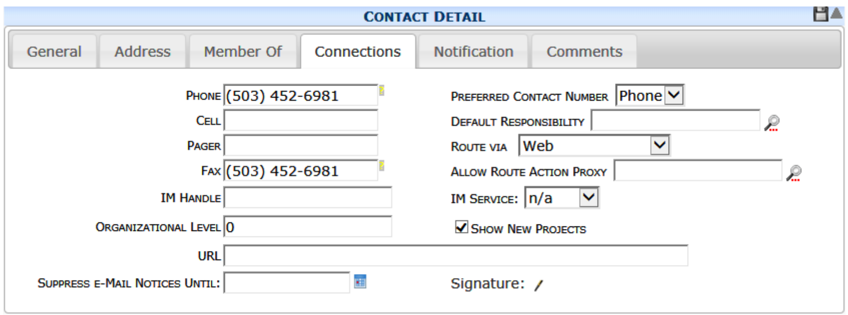
To add or edit a comment:

1. To add, click . To edit, click .
2. Enter or change the Remark.
3. Click ✓ to accept your changes and to save them.

Connections Tab

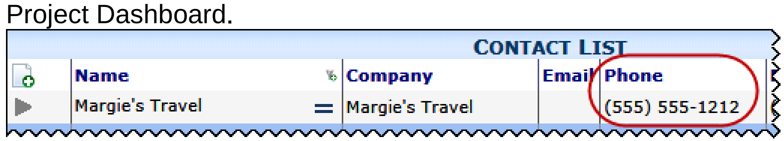
The Connections tab is available

From	**_For_**	**_On_**
Contacts Dashboard	All Contacts	Contact Detail
Elsewhere	All Contacts	Contact Detail



Possible Fields

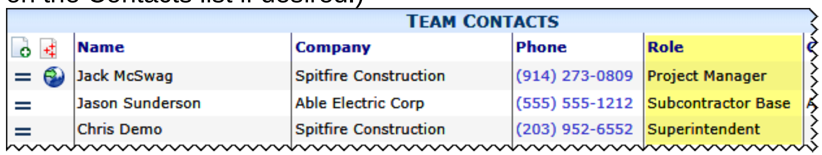
- **Phone, Cell, Pager, Fax:** numbers in the format of (*nnn*) *nnn-nnnn.* You can also enter a plus sign **+** followed by a string of numbers.
  Note: you should type only the numbers for the phone number. It will be formatted (with parentheses and dashes) as you type.
- **IM Handle:** the Instant 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 Organizational Levels.)
- **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.



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 responsibilities.) 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

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	Superintendent

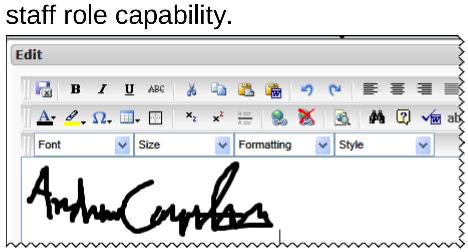
- **Route Via:** This drop-down determines how documents and files attached to the documents are to be routed to the Contact by default:
    - **E-mail:** printouts of the documents and attached files will be emailed to the email address specified on the General tab
    - **Fax:** printouts of the documents 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.

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

- **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.

> **TIP**
> For more information about role capabilities, see the *Designing User Roles* technical white paper.

- **Show New Projects:** When checked ☑ 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.

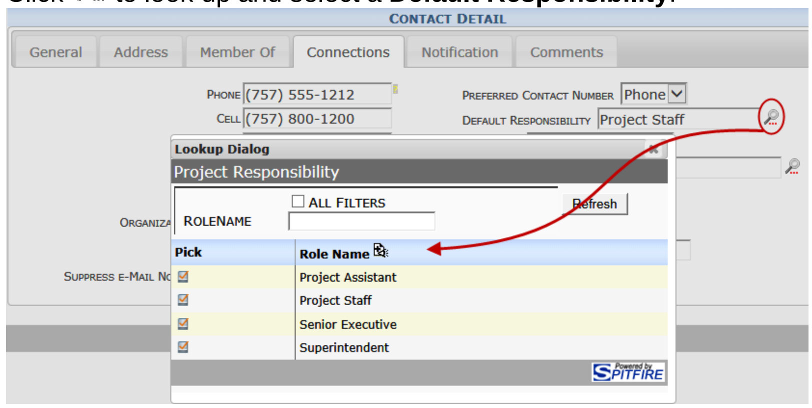


> **TIP**
> If you have trouble pasting an image into the text editor, see KBA-01586.

Default Responsibility

To change the default responsibility of a Contact:

1. Click to look up and select a **Default Responsibility**:



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 Responsibilities).

2. Click to save your information.

CSI Tab

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

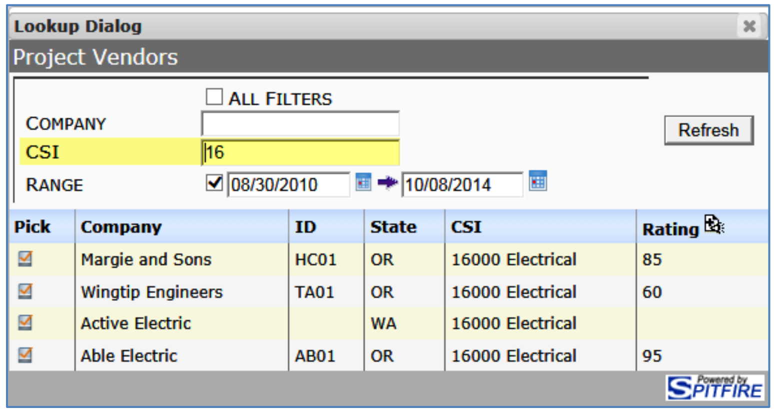
The CSI tab is available

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.

Fields

- **CSI Code:** a CSI code associated with this company. CSI codes are defined in the CSI Maintenance tool (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 ☑, 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:



To add a new CSI code to a company:

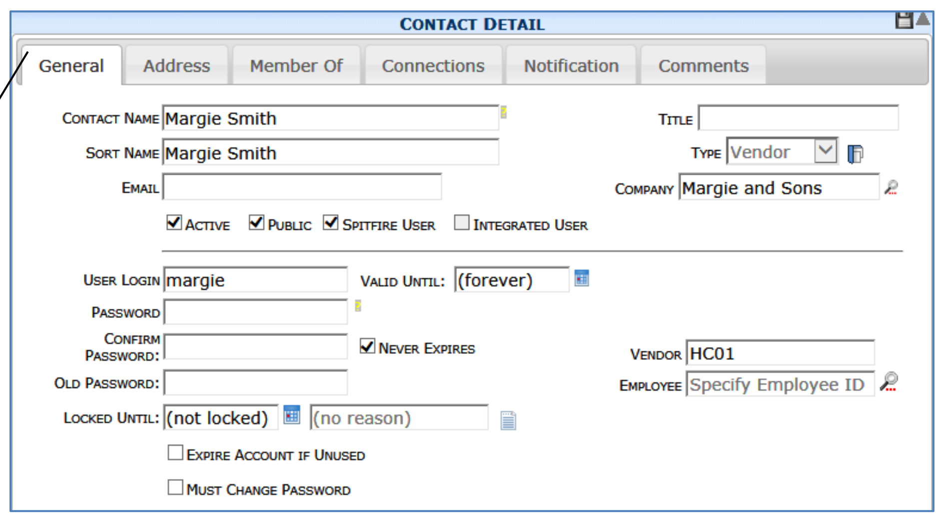
1. Click to add a new row.
2. Click to lookup a **CSI Code**.
3. Click to accept your changes and to save them.

General Tab

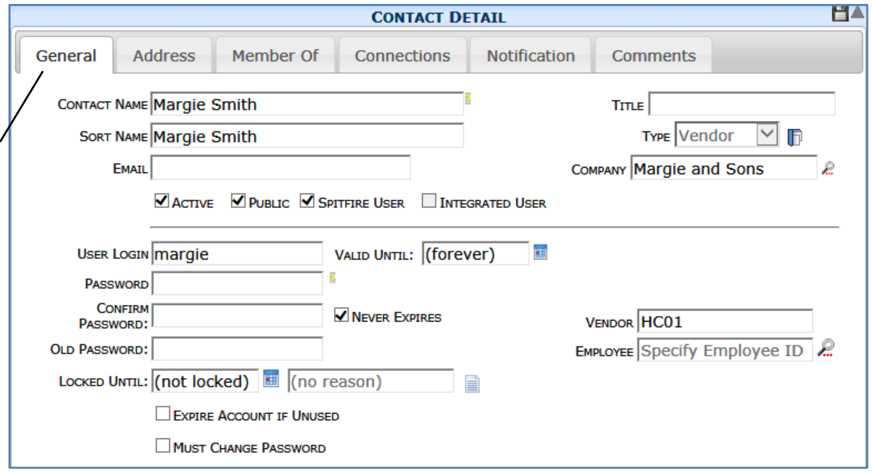
The Comments tab is available

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

Example of the General tab when the Contact Detail window is accessed for an individual from the Contacts Dashboard.



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



Possible Fields

- **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 Route Via "Email" routee on any document (see page 21). The email address is also used by the Password Recovery Wizard.
- **Active:** Active Contacts ☑ 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 ☑ 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.
- **Spitfire User:** If a Contact is a Spitfire user ☑, a User Login and Password are also required. Contacts who are not designated as Spitfire users ☐ cannot log in to sfPMS.
  Note: Companies cannot be made Spitfire users.
- **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). See pages 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.

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.

- : 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.

TIP

For more information about changing your password, see *the Overview Guide*.

- **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.

TIP

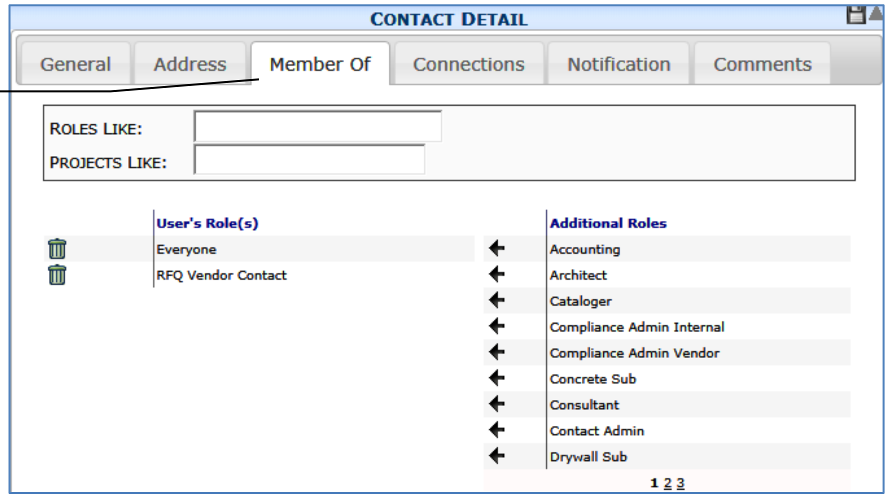
Password expiration is set up in the sfPMS | Passwords tab in ICTool.

- **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.

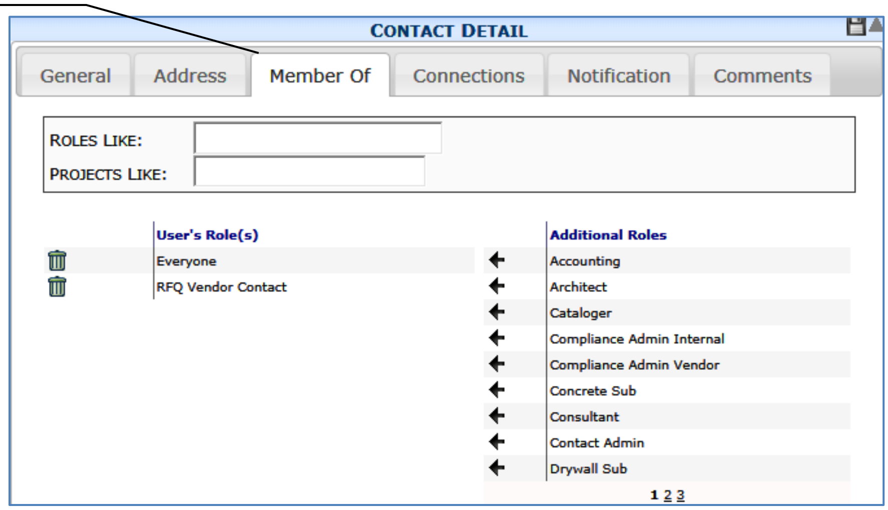
Member Of Tab

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

Example of the Member Of tab when the Contact Detail window is accessed for from the Contacts Dashboard.



Example of the Member Of tab when the Contact Detail window is accessed from somewhere else.



Possible Fields

TIP

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).

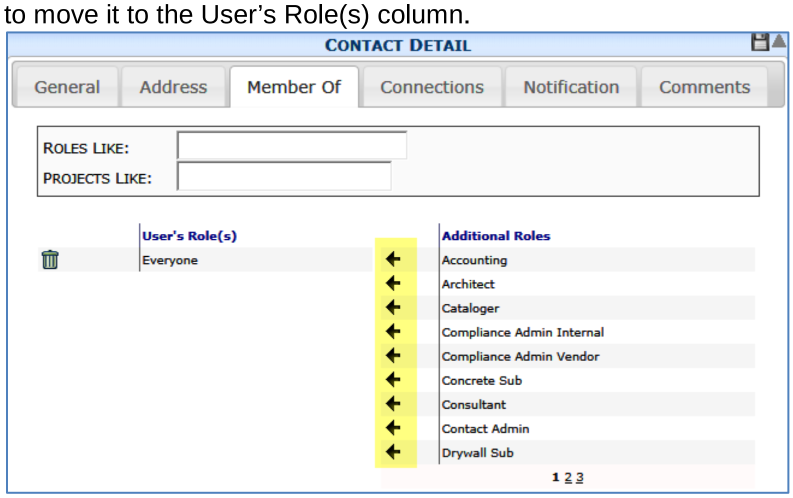
Assigning Roles

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 *Designing User Roles* for more information about setting up roles.

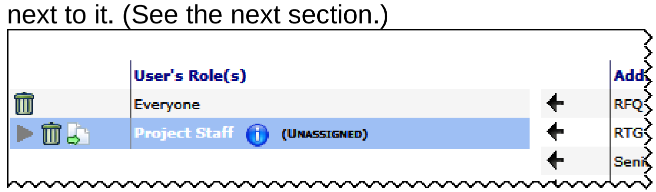
To assign a role to a Contact:

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



Notes:

- If there are multiple roles in the User's Role(s) column, the 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.)



To delete a Contact Role:

- On the Contact's **Member Of** tab, click 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.

About "Limit By Project"

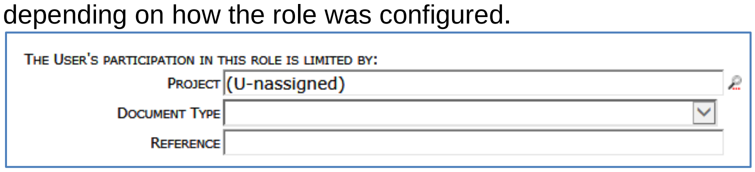
- If you look up a specific Project ID, the Contact will have the role's capabilities on that one project only, even if the Contact is added to other project teams. However, if the Contact is not already on a project team, indicating the Project ID here will automatically place the Contact on that project's 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.

TIP

For more information about adding a Contact to a project team, see page 41.

To limit a role:

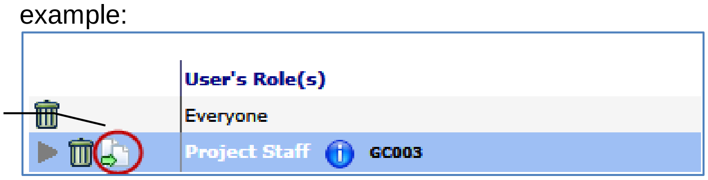
1. Click if you want to limit the unassigned role.
2. Enter or look up a project, document type or reference, depending on how the role was configured.



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

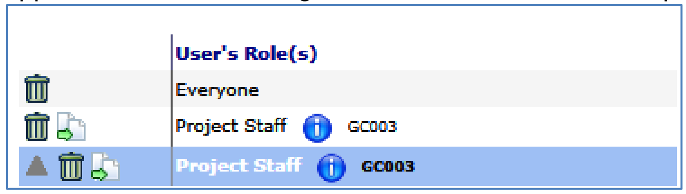
3. Click to save your new information. If the role can be copied, a new icon, used to copy the role, will appear next to the role, for example:

Roles that can be copied are identified by the icon.



To copy a role:

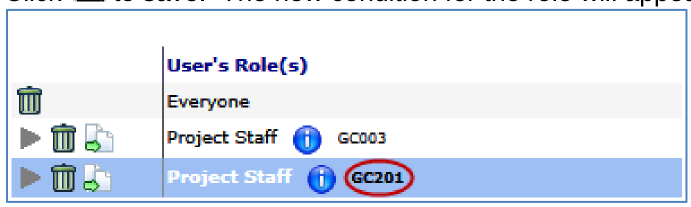
1. Click next to the role you want to copy. A copy of the role will appear below it, indicating the same condition, for example:



2. Edit the copied role and change the condition in the fields that appear below.

3. Click to return to Grid view

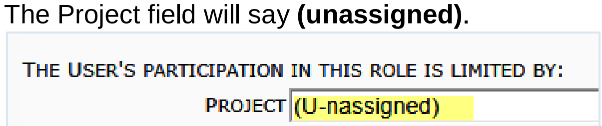
4. Click to save. The new condition for the role will appear:



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 icon. Two things will happen:

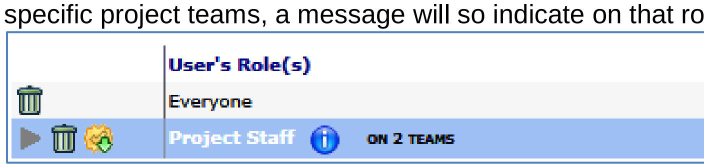
- The Project field will say **(unassigned)**.



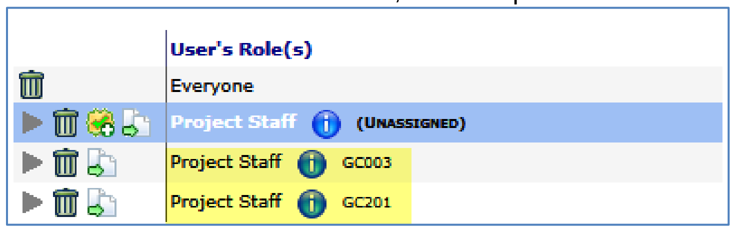
- If the Contact has been added to specific projects, the Contact will have the role assigned to those specific projects. (See example below.)

To demote a global role:

1. Click 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.

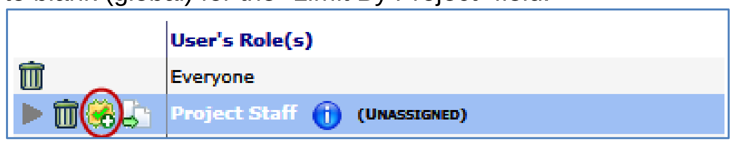


- Click to save. If the Contact is on specfic project teams, new rows will be added for each team, for example:

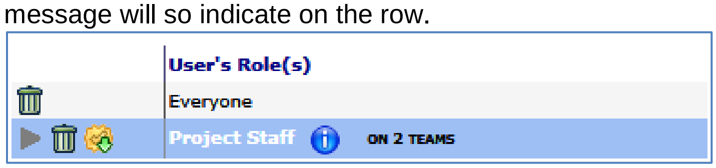


To promote an (unassigned) role:

1. Click next to a role that you want to switch from (unassigned) to blank (global) for the “Limit By Project” field.



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

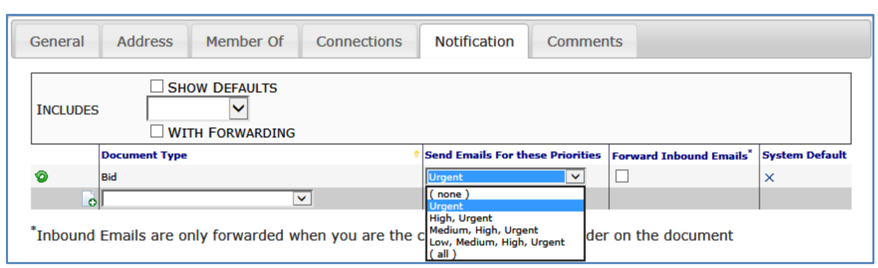


Notification Tab

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

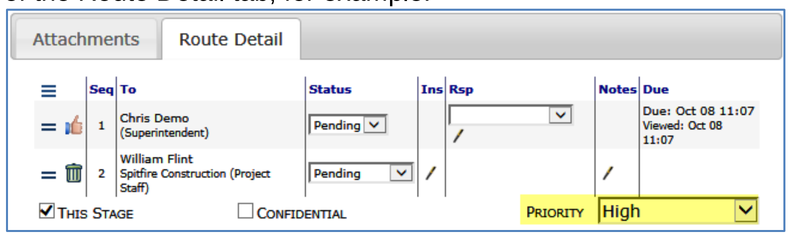


Fields

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 *Focus on Routes* guide.

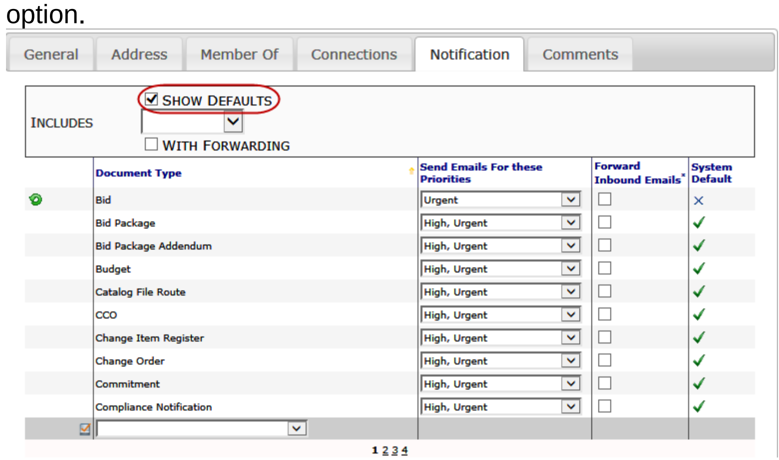
- **Document Type:** all Doc types that are active in your system.
- **Send Emails For these Priorities:** the document priority level or levels that will trigger email notifications. For example, if **High, Urgent** is set for Commitments, then an email will be sent to the Contact every time a Commitment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



- **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.



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 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.

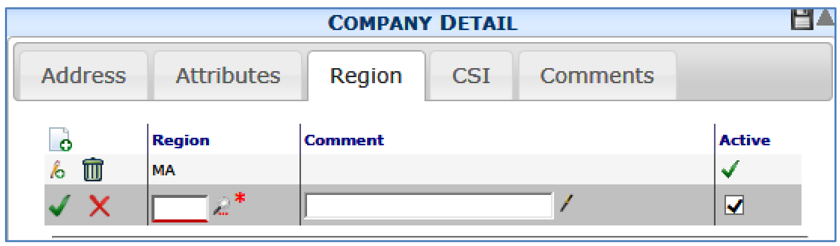
1. Select a **Document Type** from the drop-down menu.
2. Select the new priority (or priorities) from the **Send Emails for these Priorities** drop-down menu and check (or uncheck) the Forward Inbound Emails checkbox.
3. Click to save your changes.

Region Tab

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

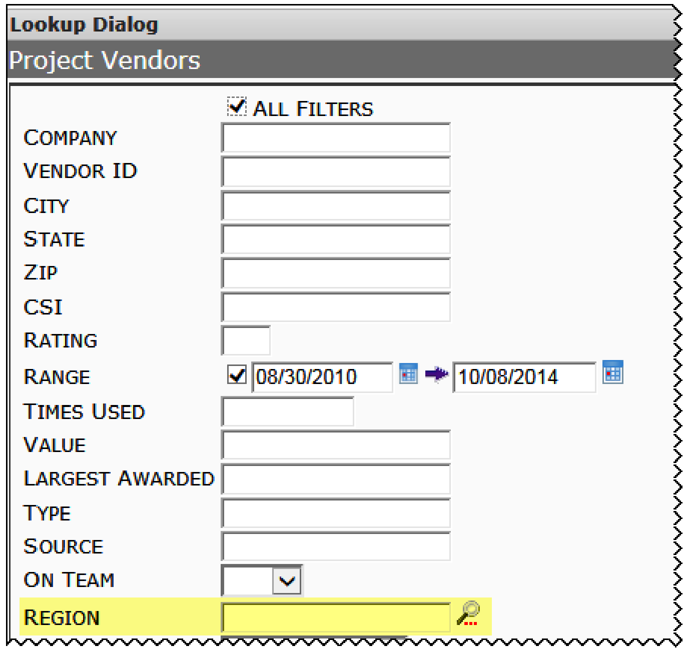
The Region tab is available

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



Fields

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



To add a new region to a company:

1. Click to add a new row.
2. Click to lookup a **Region**.
3. (*optional*) Enter a **Comment**.
4. Click to accept your changes and to save them.

Accessing Contact Details

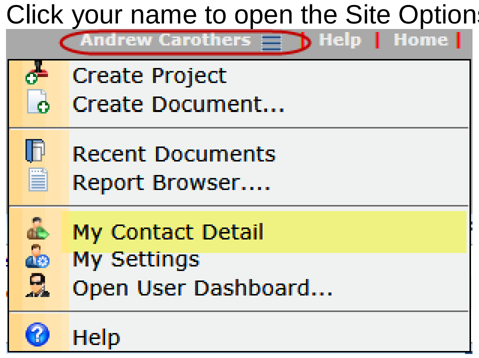
While certain users will have access to Contact (and Company) Detail information on the Contacts Dashboard (see page 49), more users have read or full access to Contact Details from outside the Contacts Dashboard, for example, from the Team Contacts part of a Project Dashboard (see next chapter). All 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 add you as a Spitfire user (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.



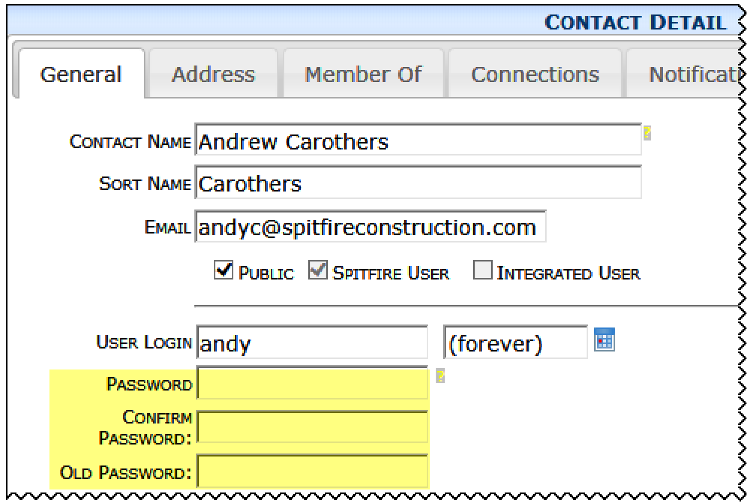
3. Select **My Contact Details**. Your Detail window will open:

   For descriptions of the fields on the Contact Detail window, see page 15.

Changing Your Password

To change your password from the Contacts Details window:

1. 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.



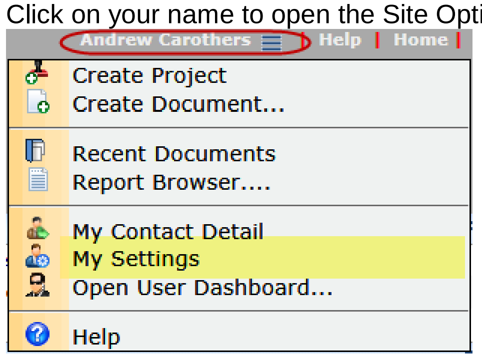
2. Type the same password in the **Confirm Password** field.
3. Type your old password in the **Old Password** field. If you do not remember your old password, you will need to see the System Administrator, who is allowed to change passwords without the old password.
4. Click to save your change. Both 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 icon. You may see the 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.

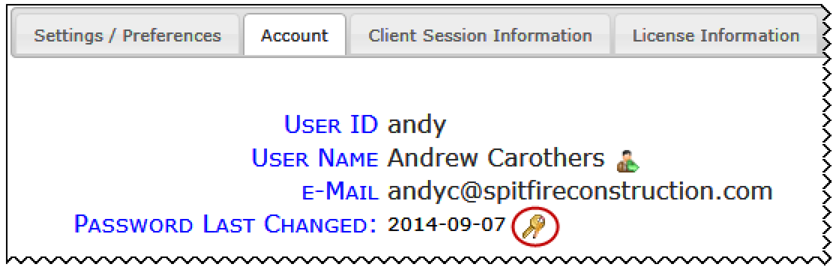
To change your password from the Change Password pop-up:

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

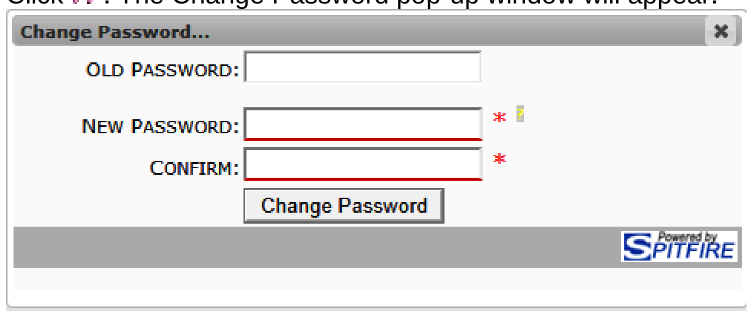


2. Select **My Settings**.

3. Go to the **Account** tab.



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



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 E-mail Notifications

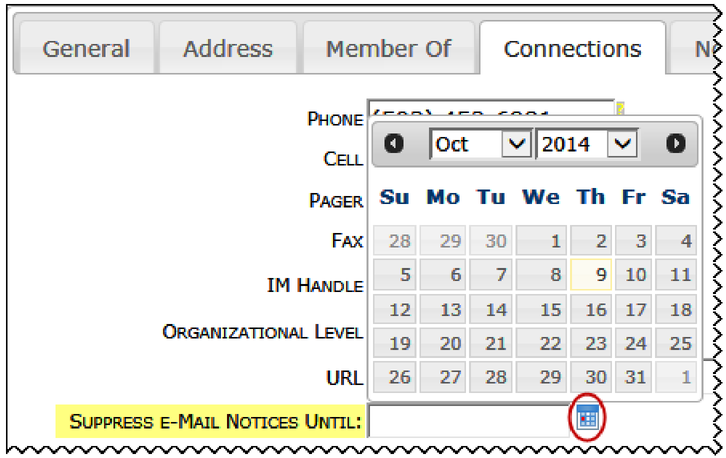
If you know that you will be away for a while and do not want to receive email notifications about documents in your Inbox while you are away, you can choose to suppress email notifications.

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.

To suppress e-mail notifications:

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



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.

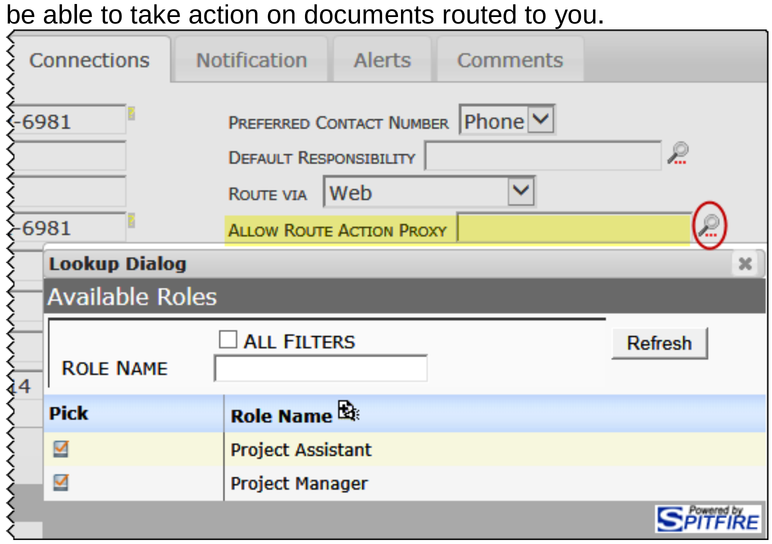
Establishing a Proxy

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 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.



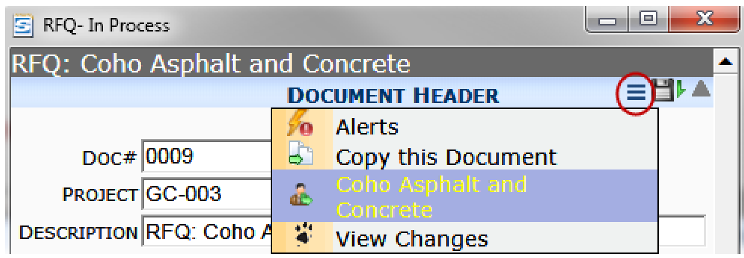
3. To remove a proxy, delete the field in order to leave it blank.

4. Click to save your changes.

Contact Information from Documents

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:



TIP

For more information about documents, see the *Focus on Document and Item Basics* guide.

To open Contact Details from a document:

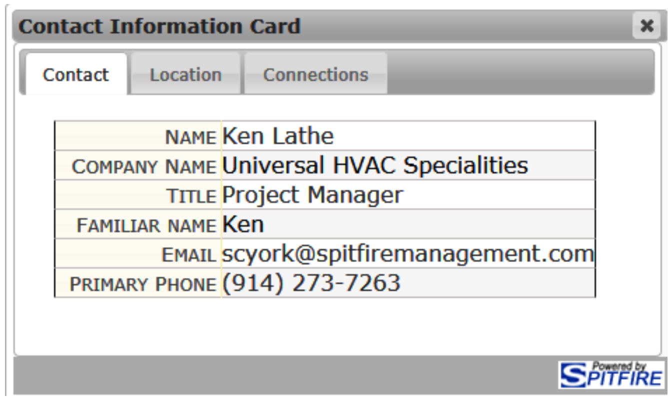
1. From an appropriate document, click to open the Document Options menu.
2. Click . The Contact Detail window for that Contact will open.

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.

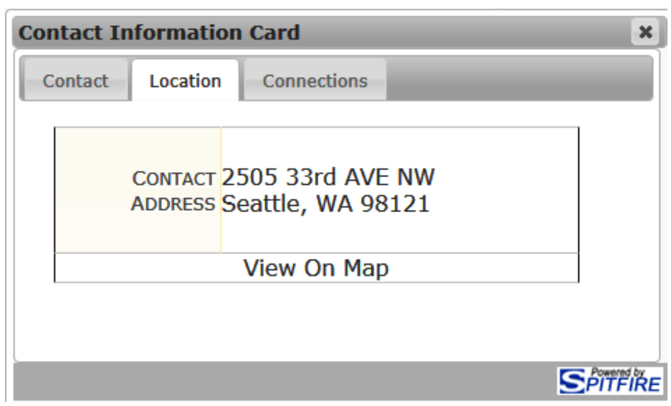
If you have permission to make changes to the Contacts Detail tabs, see page 15 for information on the General, Address, Member Of, Connections, Notification, Alerts and Comments tabs.

Contact Information Cards

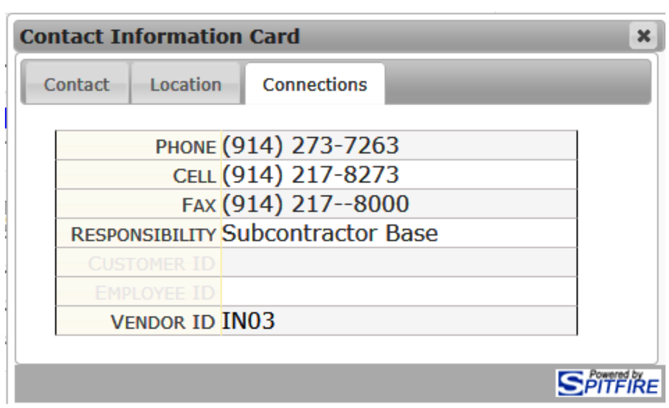
You can also access information about a Contact through pop-up Contact Information Cards.



For an explanation of this information, see page 24.



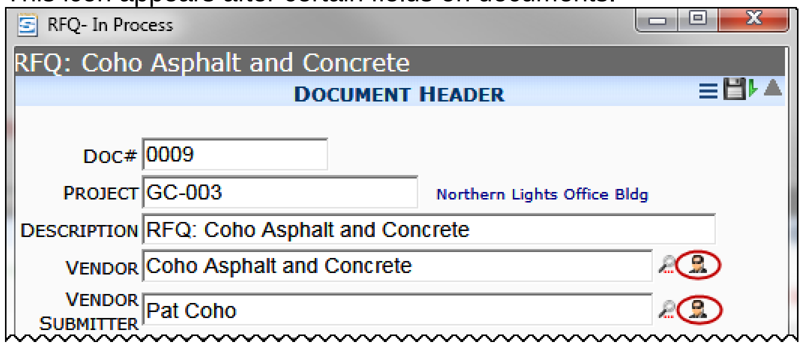
For an explanation of this information, see page 16.



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

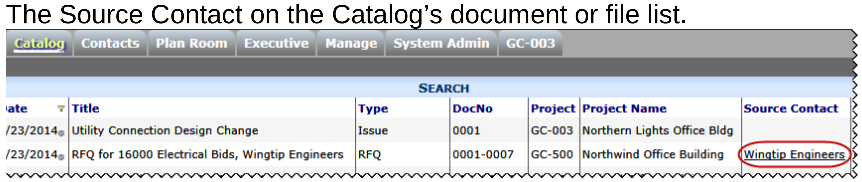
Accessing the Contact Information Card

One way to access the Contact Information Card is through the icon. This icon appears after certain fields on documents.

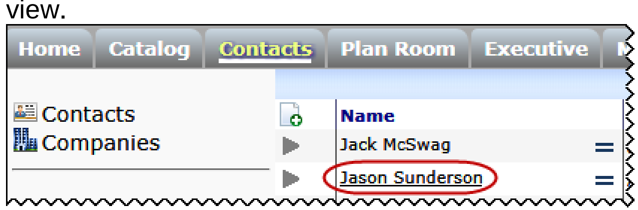


The Contact Information Card is also accessed through name links:

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



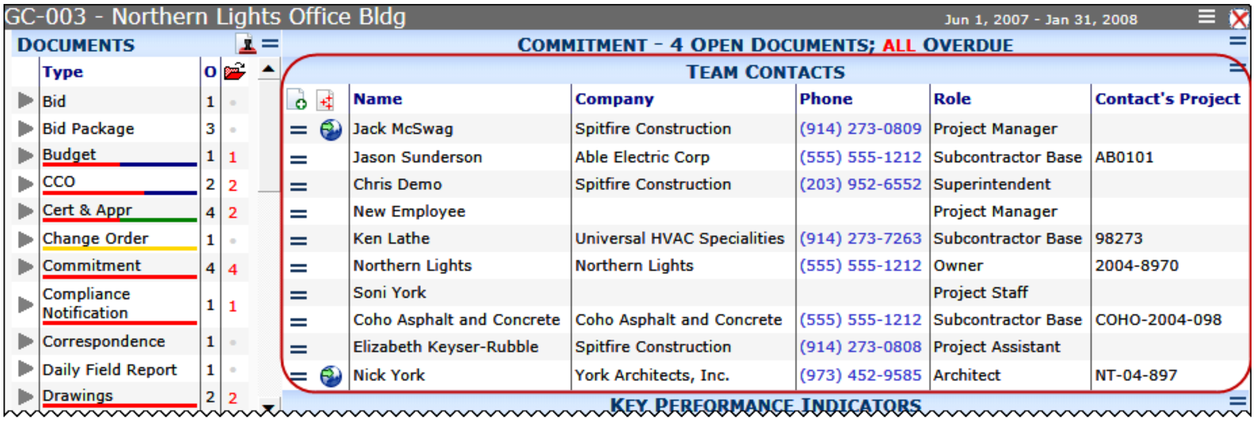
- The Name on the Contacts list, in both Contacts and Companies view.



- Names on certain document tabs.

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:



Name	Company	Phone	Role	Contact's Project
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	
New Employee			Project Manager	
Ken Lathe	Universal HVAC Specialities	(914) 273-7263	Subcontractor Base	98273
Northern Lights	Northern Lights	(555) 555-1212	Owner	2004-8970
Soni York			Project Staff	
Coho Asphalt and Concrete	Coho Asphalt and Concrete	(555) 555-1212	Subcontractor Base	COHO-2004-098
Elizabeth Keyser-Rubble	Spitfire Construction	(914) 273-0808	Project Assistant	
Nick York	York Architects, Inc.	(973) 452-9585	Architect	NT-04-897

Item Grid View

Columns

By default, the Project Contacts part displays the following information for team members:

TIP
The ProjectConfig | BuildTeam rule can add certain Contacts automatically to a project. For more information, see the *Rules and Rule Values* technical white paper.

- **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.

Name	Company	Phone	Role	Contact's Project	Public	Active	Show
Jack McSwag	Spitfire Construction	(914) 273-0809	Project Manager		×	✓	☑

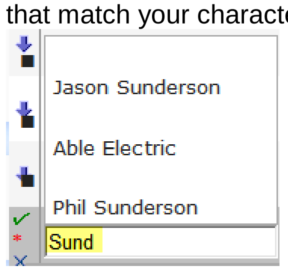
- **Show Hidden** (See page 44.)
- **Members Like** (See page 46.)

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.

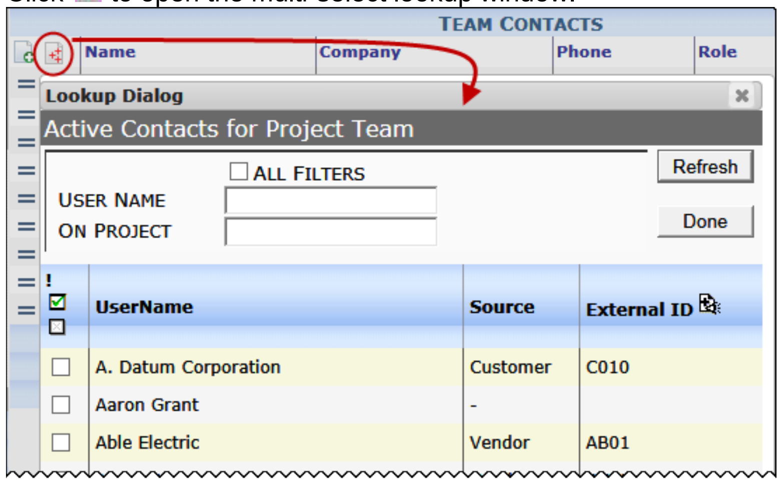
To add one Contact to your project team list:

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 hidden (see page 44).
3. Assuming the person is not on the Team Contacts list, click 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.


4. (*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 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.
7. Click to accept your changes.
8. Click to save your changes.

To add multiple Contacts to your project team list:

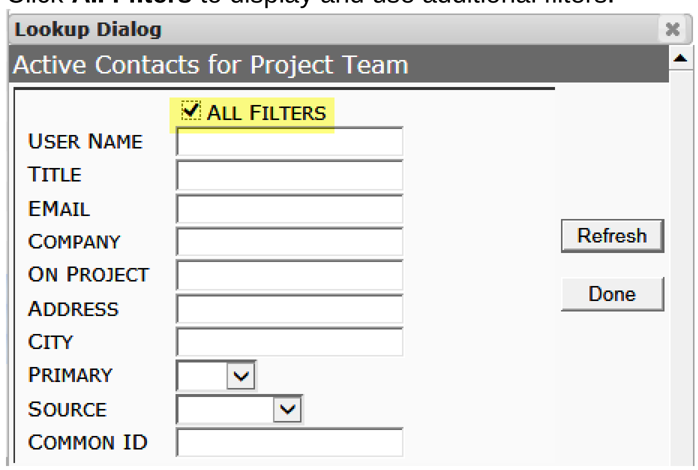
1. Click to open the multi-select lookup window.



2. Use the filters to find the Contacts that you want to add to your project.

   o If you want to find all team members on another project, enter the project ID (without masks) in the **On Project** field.

   o Click **All Filters** to display and use additional filters.



   o Click Refresh to see your filtered results.

3. Either click 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.

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.

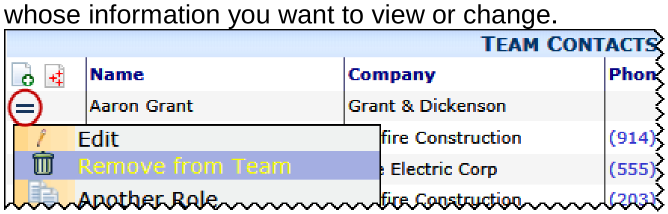
TIP
Your lookup results automatically omit Contacts who already are on the current project team.

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 to open the Contact Options menu for the Contact whose information you want to view or change.



2. Click **Remove from Team**.
3. Click to save and remove the Contact from the list.

Show vs. Hide Contacts

TIP
For more information about the PART | Project Member Contact Viewer role capabilities, see the technical white paper *Designing User Roles*.

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:

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


TEAM CONTACTS

SHOW HIDDEN

MEMBERS LIKE

	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	✓	✓	☑

2. 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.

To show all Contacts, including hidden Contacts:

1. Either click then select **Show Filter**
   -or-
   mouse over the **Name** column header to display the drop-down menu.

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

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		×	✓	☑
William Flint	Spitfire Construction	(757) 555-1212	Project Staff		×	✓	☐
New Employee			Project Manager		✓	✓	☐
Ken Lathe	Universal HVAC Specialities	(914) 273-7263	Subcontractor Base	98273	✓	✓	☑
Northern Lights	Northern Lights	(555) 555-1212	Owner	2004-8970	×	✓	☐
Soni York			Project Staff		×	✓	☐

   - means the person has a status of **Show**;
   - 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

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 ✓ in the **Public** column means that the Contact will appear in lookups related to this project. An × 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.

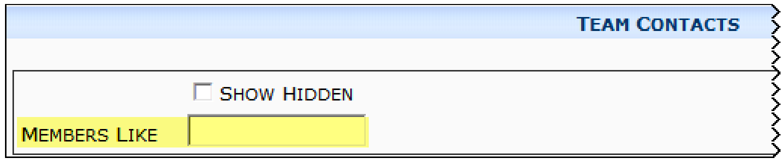
Active vs. Inactive

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

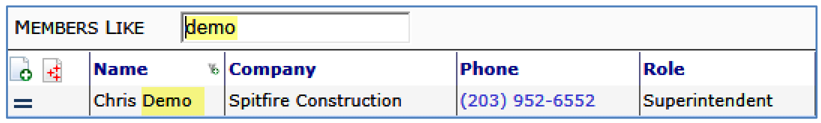
Note: only those with permission can change the Active status of team members.

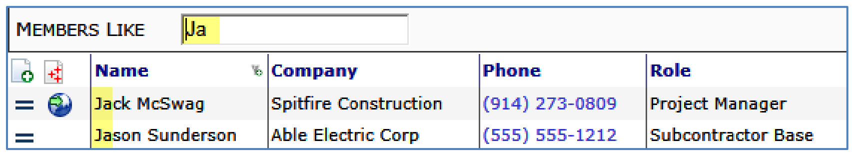
Members Like Filter

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.



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





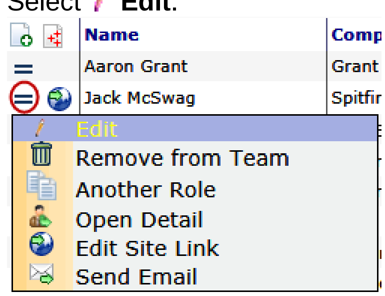
If too many results are returned, we recommend you use a longer search term (e.g., **Jac** instead of just **J**).

Edit Grid Information

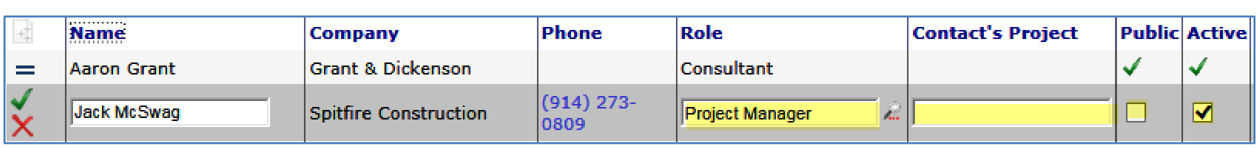
If you have the proper permission, you can make changes to a Contact's Grid view information.

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:



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.

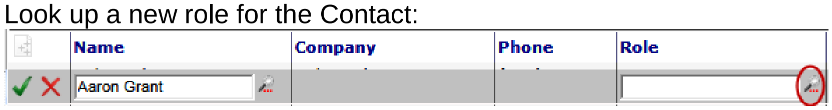
3. Make your changes or additions in the appropriate fields or checkboxes.
4. Click ✓ to accept your changes or ✗ to cancel them.
5. Click to save your changes.

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:



4. Click ✓ to accept your changes or ✗ to cancel them.
5. Click to save your changes.

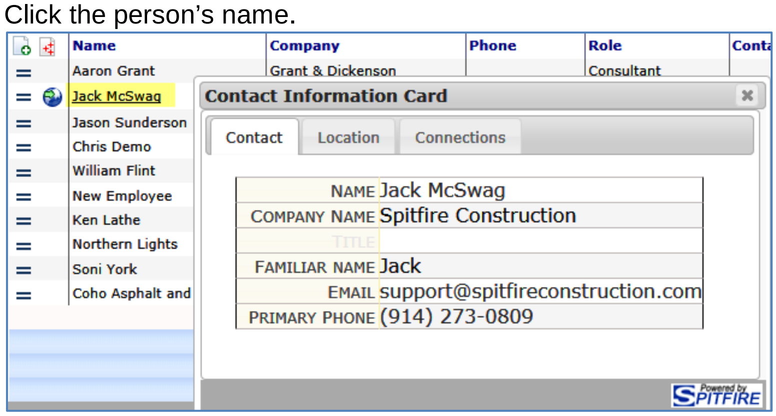
Contact Details

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.
2. Select **Open Detail**. The Contact's Detail window will open (see page 14).

To open the Contact's Information Card:

- Click the person's name.

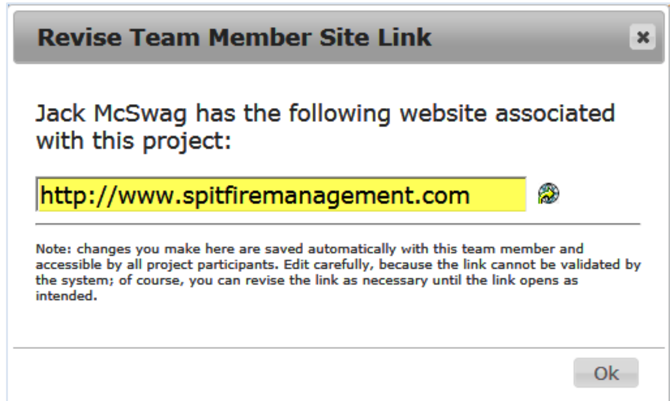


Website URL

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:

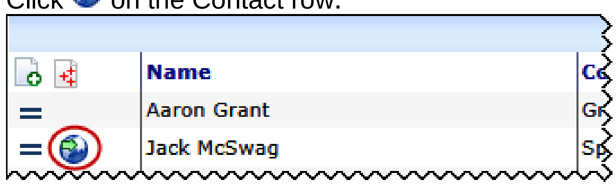
1. Click to open the Contact Options menu for the Contact whose website you want to access.
2. Select **Edit Site Link**. The following window will appear:



3. Edit the URL as necessary then click Ok.

To open the Contact's website:

- Click on the Contact row.

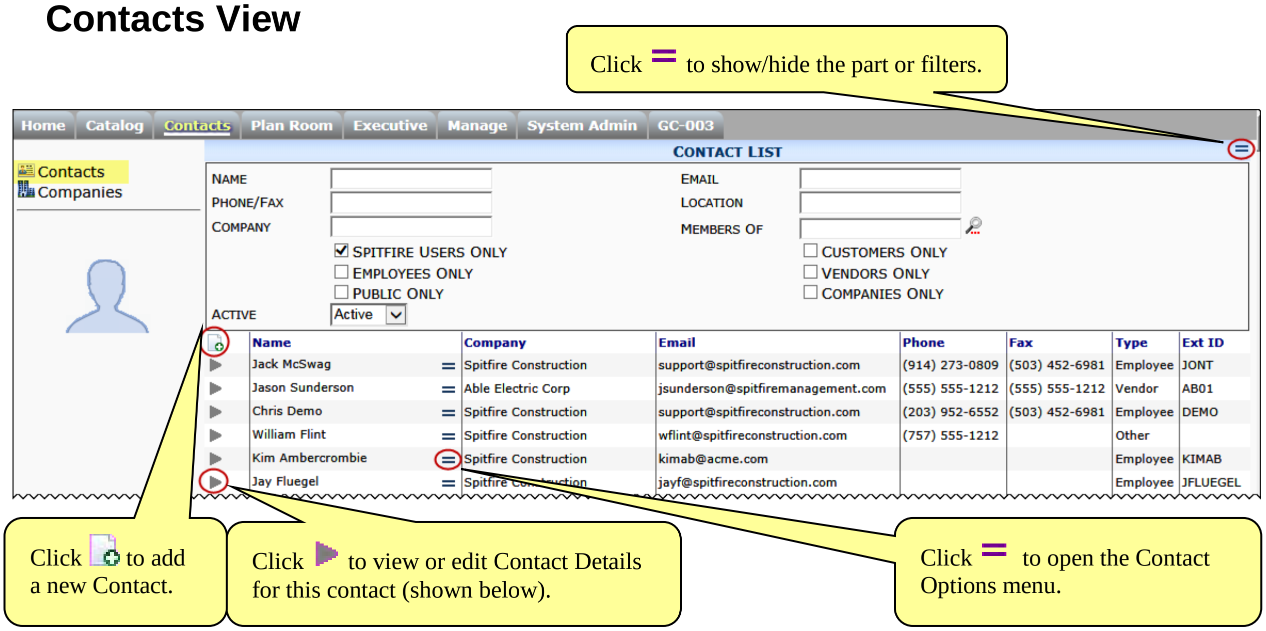


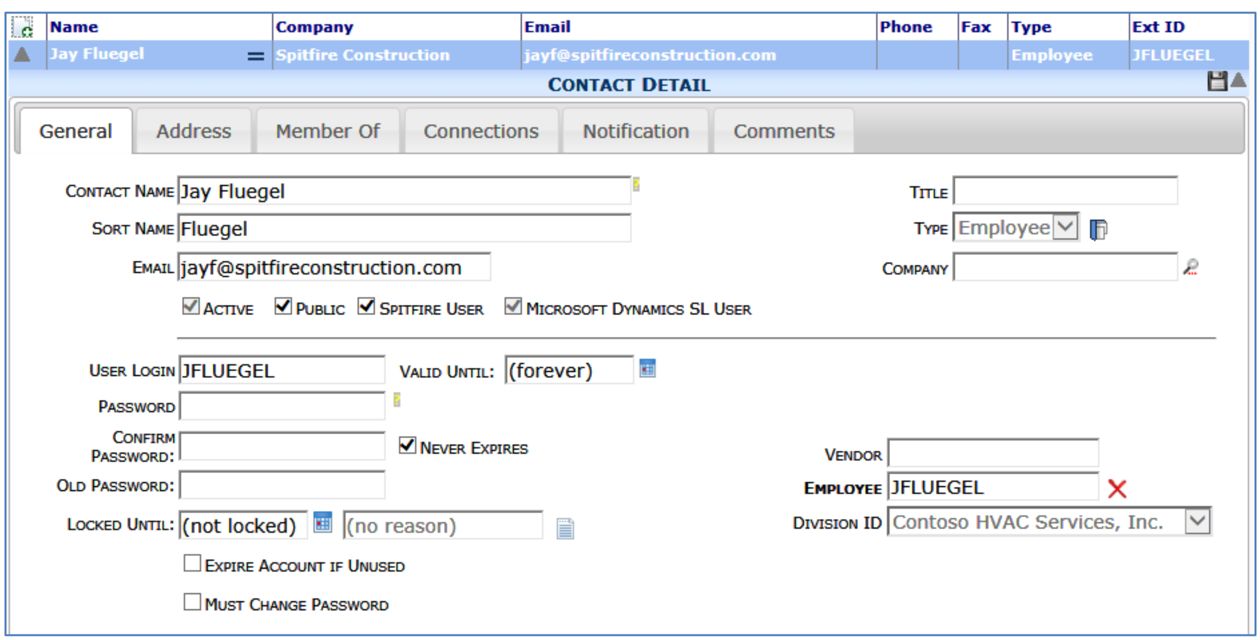
The Contacts Dashboard

The Contacts Dashboard lists Contact information in two views:

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

Contacts View

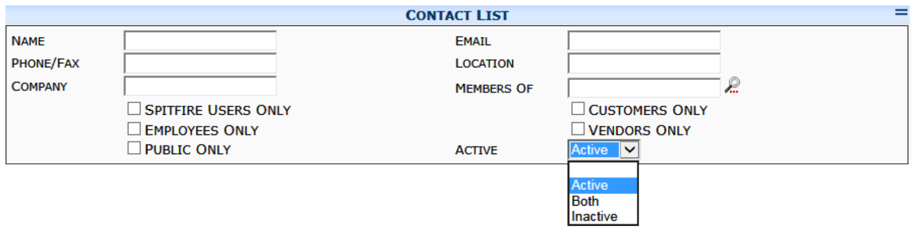




The Filters

> **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:

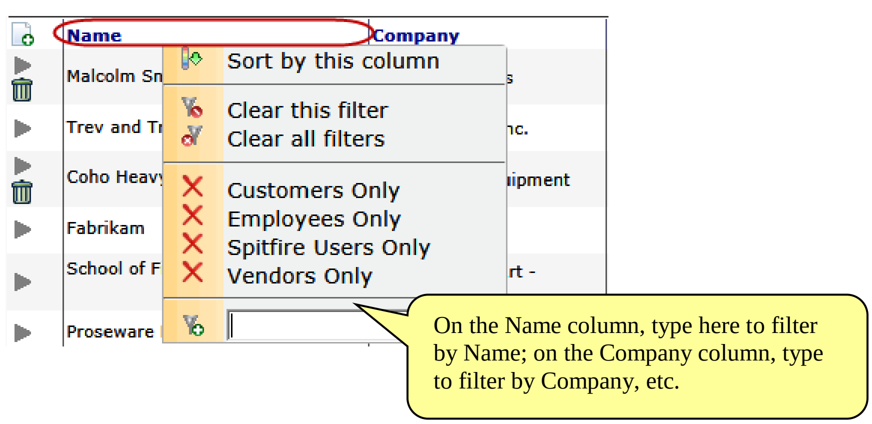


When you change filters, press the **Enter** key to refresh the resulting list.

- 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 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:



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

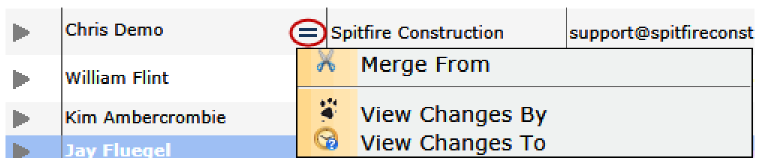
The Columns

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

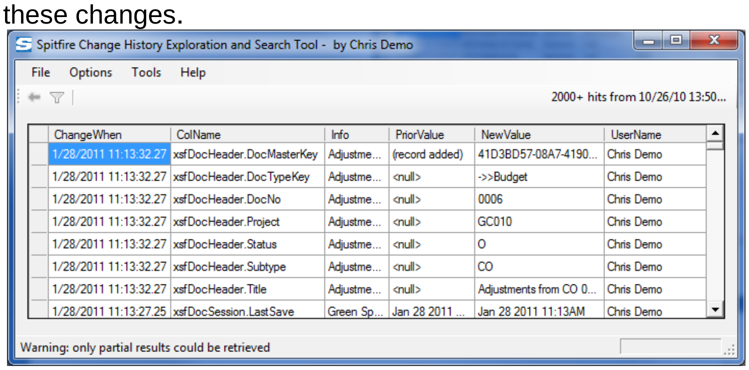
- **Name**: The name of the Contact (individual or company).
- **Company**: The company associated with the Contact.
- **Email**: the email for the Contact.
- **Phone/Fax**: the phone and fax numbers for the Contact.
- **Type**: the type of Contact (Vendor, Customer, Employee, Other).
- **Ext ID**: the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



- **Merge From**: Click to merge contact details from this record to another. (See page 64.)
- **View Changes By**: Click 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.

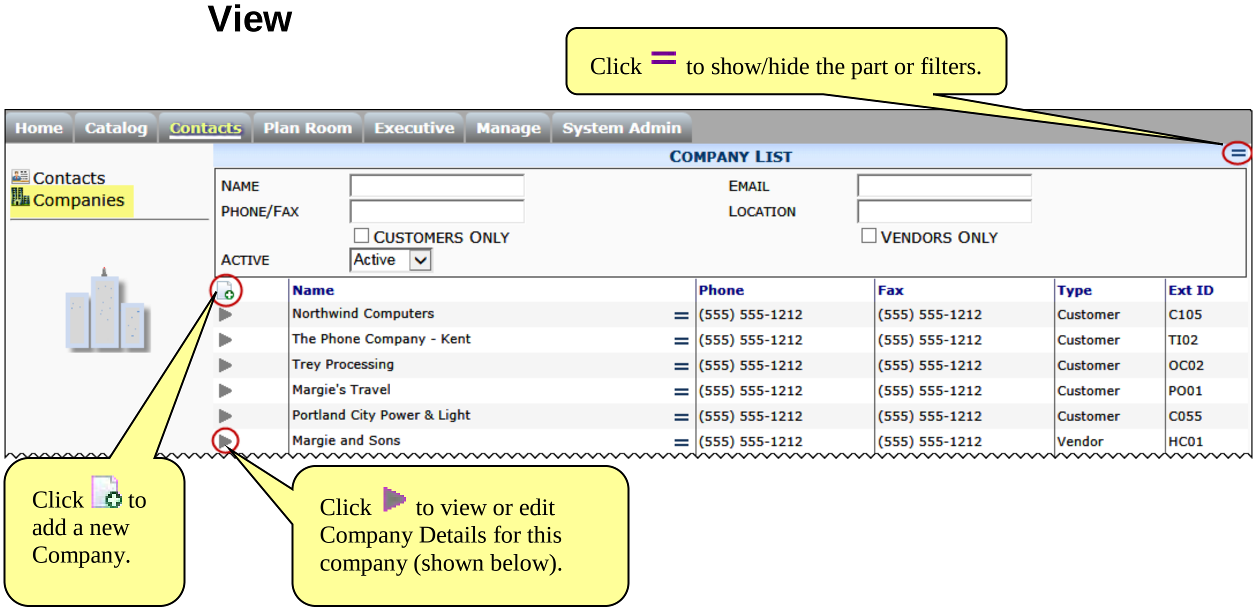


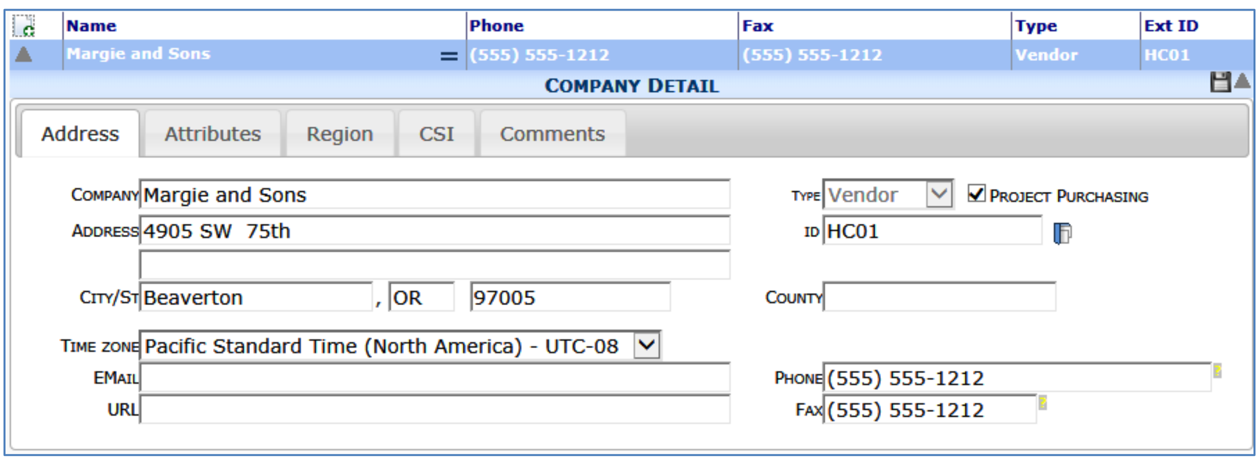
- **View Changes To**: Click to see what changes have been made to this Contact. sfChest will open, listing these changes.

TIP

For more information about sfChest, see the technical white paper *Viewing Changes through sfChest*.

Companies View





The Filters

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

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

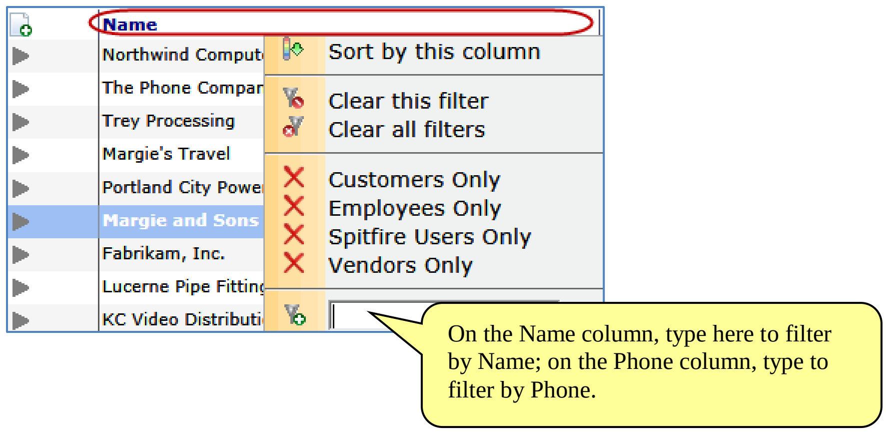
- Type one or more letters and optional wildcard in the fields:
  - **Name / Email**: returns Companies with names / emails that match the letter(s) specified.

- **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 add new contacts, 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

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

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.

- 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.

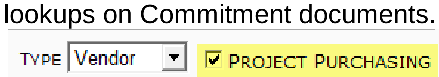
One reason you might want to add pre-vendors to your system is to be able to add these pre-vendors as routees on Invitation to Bid and /or RFQ documents. Those vendors you end up not wanting to hire can remain pre-vendors, but those you do want to hire would receive IDs and become full Contacts.

Adding Pre-Vendors

To add a preliminary company to your Contacts list:

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

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—Customer, Vendor or Other (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.



5. Fill out the desired fields on the Address tab, but leave the ID field blank. (For an explanation of the Address fields, see page 15.)
6. Click to save your new Company record.
7. (*optional*) Go to the Attributes tab if you want to add attributes for this company. (For an explanation of the Attribute fields, see page 17.)
8. (*optional*) Go to the Region tab if you want to add one or more regions to this company. (For an explanation of Region fields, see page 32.)
9. (*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 CSI fields, see page 22.)
10. (*optional*) Go to the Comments tab if you want to add one or more remarks to this company. (For an explanation of Comments fields, see page 19.)
11. Click to save your new Company record.

From Pre-Vendors to Full Contacts

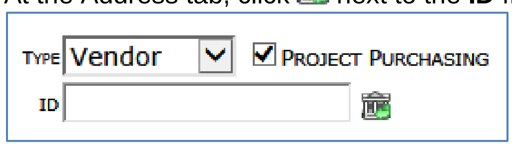
If you have preliminary companies (for example, pre-vendors) in your system, you can choose to convert any of these companies into full companies on your Contacts list.

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 next to the **ID** field.



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 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.
6. (*optional*) Click 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).

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 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.

5. Click [save icon] to save your ID. Your company will be a full Contact.

6. (*optional*) Click [icon] 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 [icon] 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

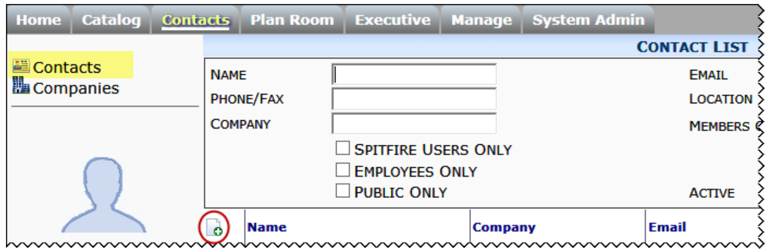
TIP

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:

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



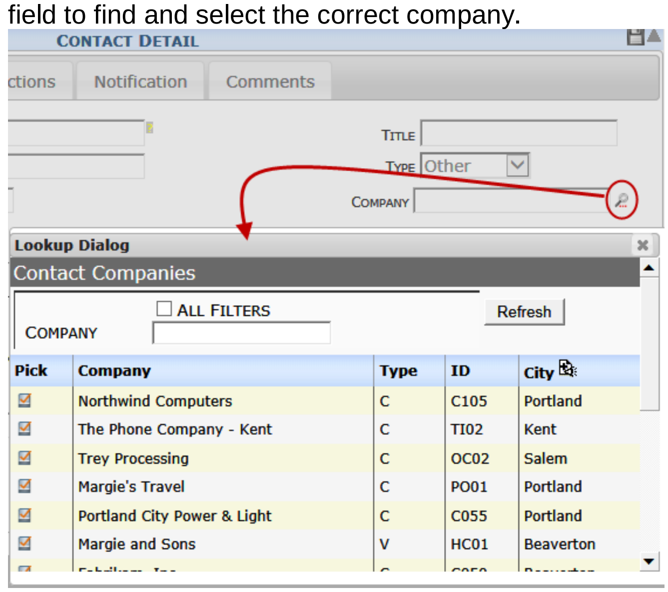
2. (*optional*) Use the filters to look for the person to ensure that he or she does not already exist in your system.

3. Click in 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 at the **Company** field to find and select the correct company.



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

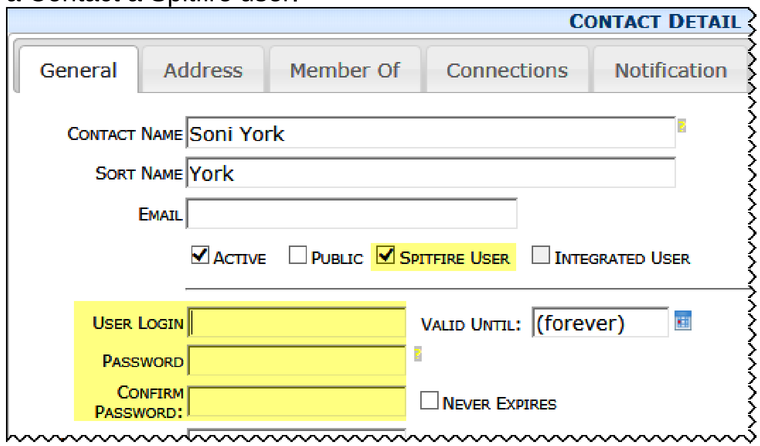
   - If this person is an employee at your company, enter a unique Employee ID at the **Employee** field.

     (*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, see page 60.

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

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).

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



   - 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.

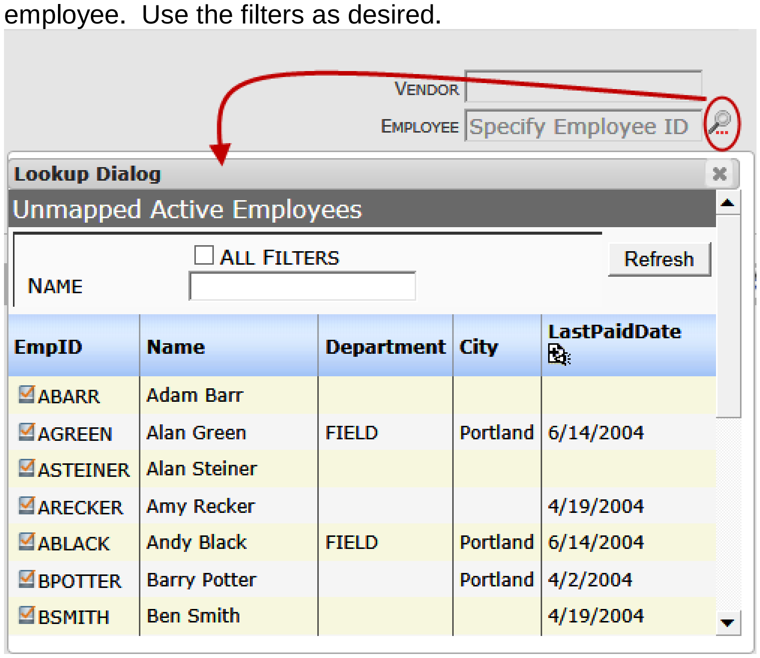
7. Fill out other desired fields on the General tab. (For an explanation of the General fields, see page 23.)
8. Go to the Address tab and decide if you want the address for this Contact to be same as the address from the linked company.
   - Keep the **Use Address…** checkbox checked if you want to 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 Address fields, see page 15.)
10. (*optional*) Go to the Member Of tab if you want to assign a role to this Contact. (For an explanation of roles on the Member Of tab, see page 26.)
11. (*optional*) Go to the Connections tab if you want to enter connections and routing information for this Contact. (For an explanation of Connections fields, see page 20.)
12. (*optional*) Go to the Notification tab if you want to change the notification level for certain Doc types. (For an explanation of Notifications, see page 30.)
13. (*optional*) Go to the Comments tab if you want to add one or more remarks to this Contact. (For an explanation of Comments 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 in the Contact List area to open a new Contact Detail window.
4. Click at the Employee field to find and select an unmapped employee. Use the filters as desired.



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

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

Updating Contacts

Integrated Sites vs. Non-integrated 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, you 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.
3. 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 the tabs on the Company Detail window.)
4. Make your changes then click to save them.

Editing Individual Contacts

To edit a Contact in sfPMS:

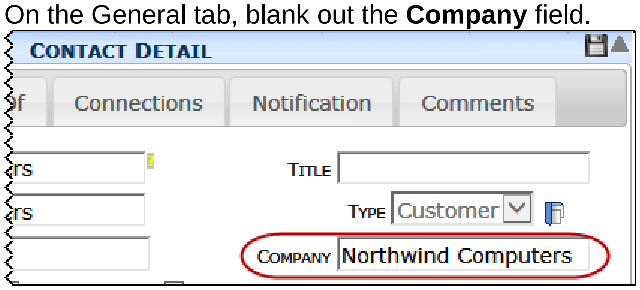
1. Select the **Contacts** list on the Contacts Dashboard.
2. (*optional*) Use the filters to look for the person you want to update.
3. Click to open the Contact Detail window. (See the chapter on page 15 for an explanation of the tabs on the Contact Detail window.)
4. Make your changes then click to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



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 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

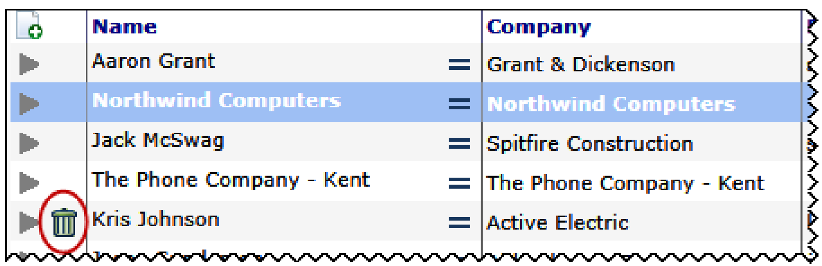
Deleting vs. Deactivating Contacts

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 icon appears on its row on the Contacts Dashboard:



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 filters (described on page 50) to find the Contact you want to modify.
3. Click at the Contact you want to remove from sfPMS.

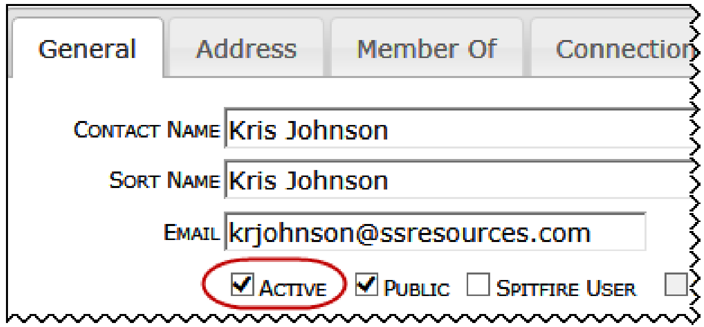
Deactivating Contacts

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

To make a non-synched Contact inactive:

1. 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 filters (described on page 50) on the Contact List to find the Contact you want to modify.
3. Click ▶ to open the Contact Detail window for the Contact.
4. Click on the **Active** checkbox on the General tab to uncheck it.



5. Click to save your change.

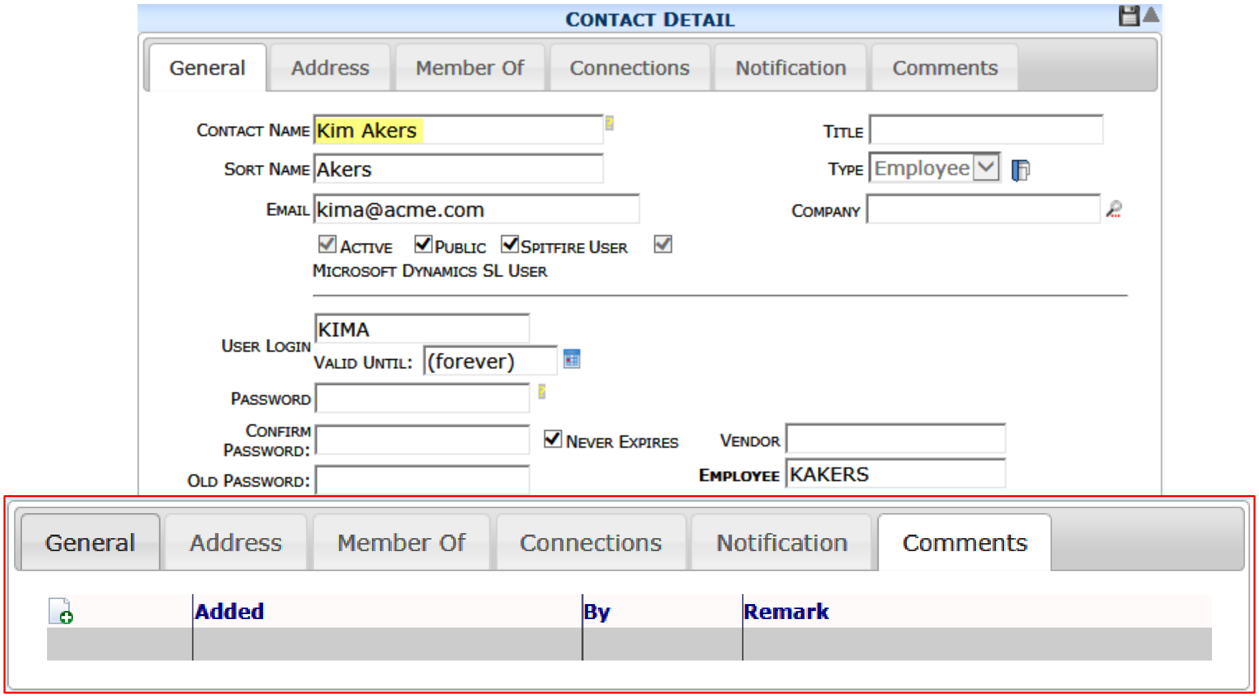
Merging Two Contact Records

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

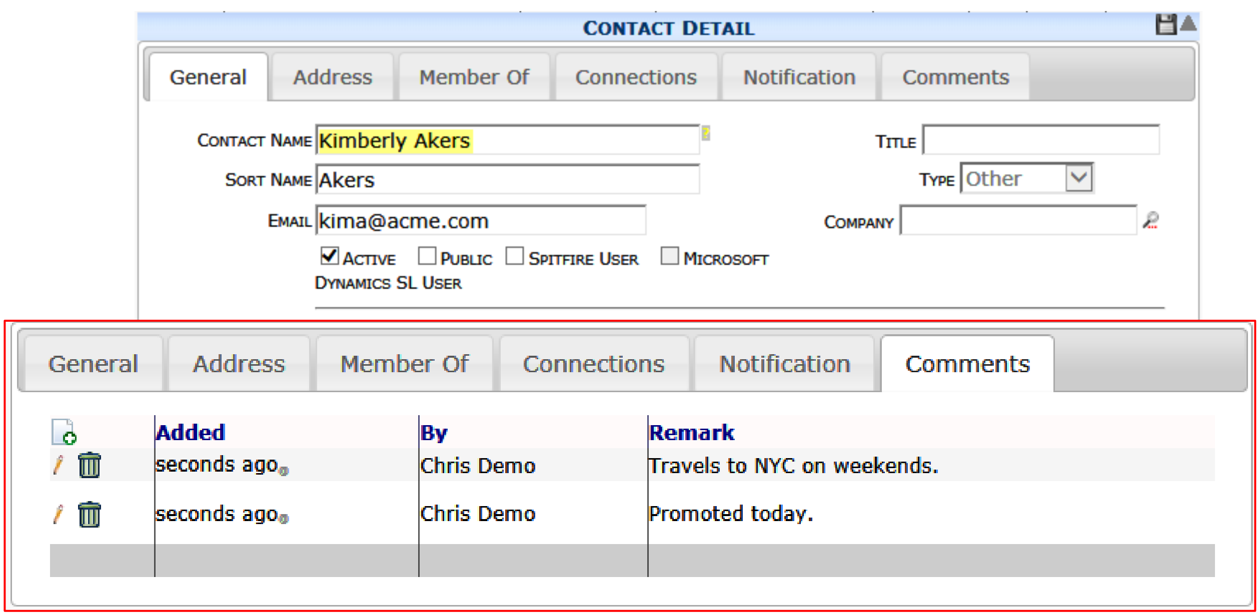
Similar names and identical e-mails indicate that the Contact records shown below and on the next page are for the same person. However, since both "Kim Akers" and "Kimberly Akers" have been used in the system, neither can be deleted. You decide to merge them. First, you compare the two Contact Detail 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 Record A:



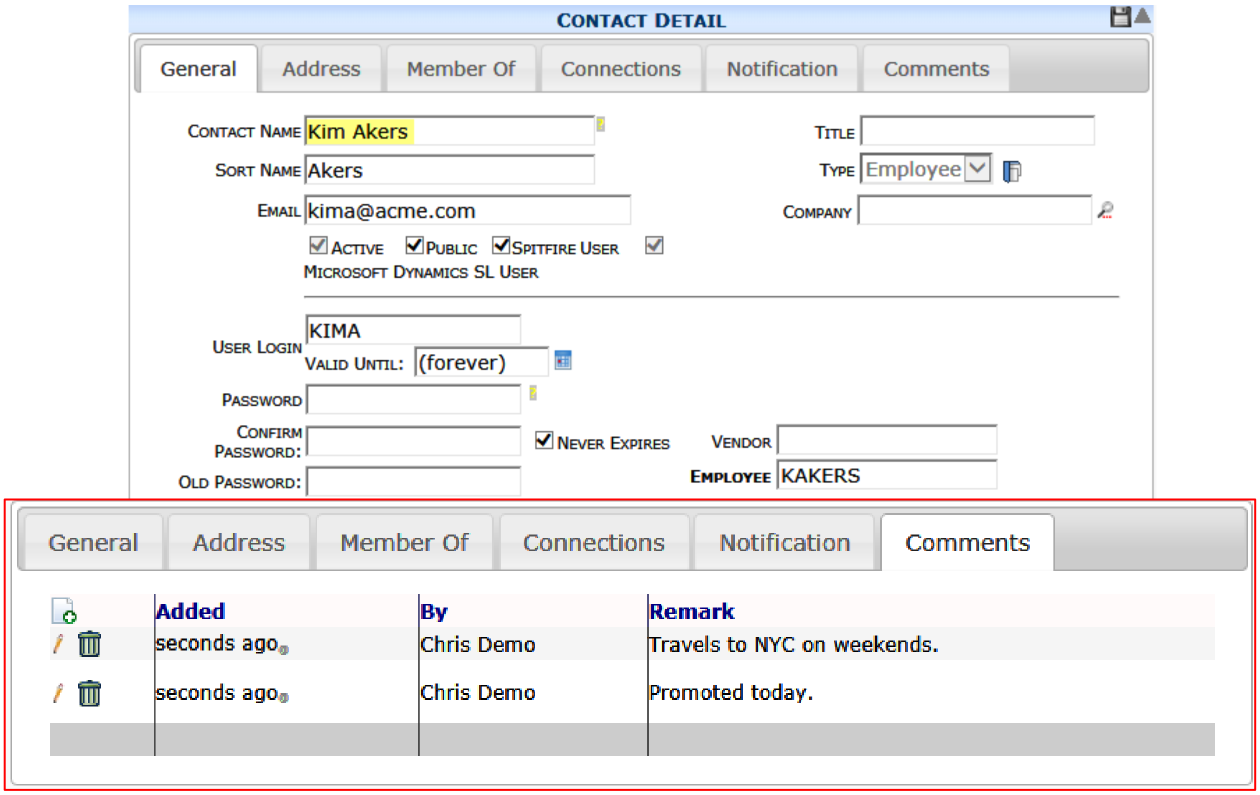
Notice that Kim Akers has no comments.

Contact Record B:



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:



Now Kim Akers has the two comments.

TIP

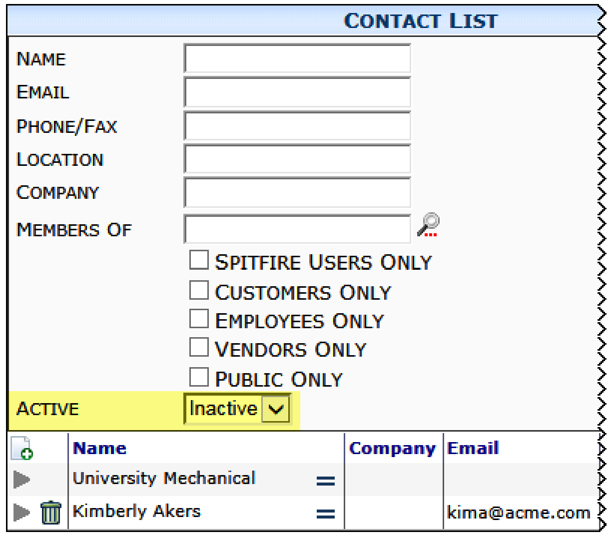
Changed your mind? You can choose expand the Contact and click to "undo" the procedure.

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 **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.

To delete an inactive Contact after a merge:

1. Select **Inactive** as the filter for the Contact List:



2. Click to delete those Contact records from sfPMS.

Associated Documents

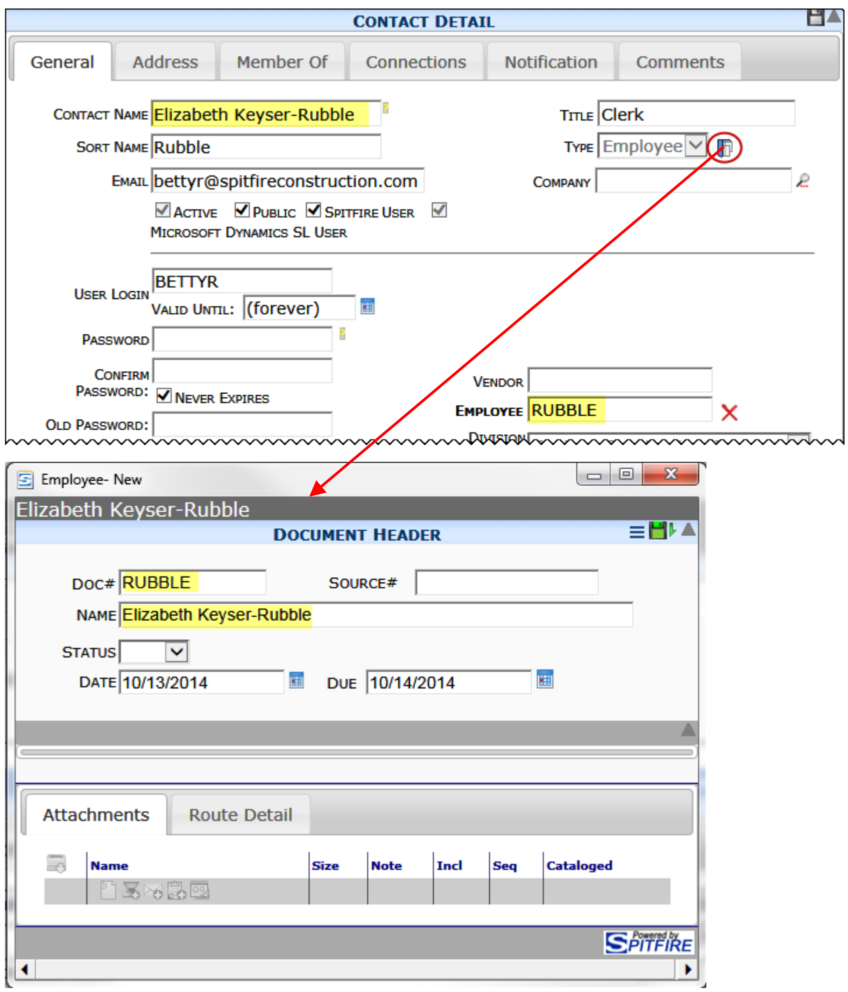
TIP

For more information about these documents, see the *Focus on Doc Types and Project Workflow* guide.

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.)

Employee Document

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.



TIP

The Alert option (found on the Options menu) is described in the *Focus on Alerts and Compliance* guide.

Attachments are described in the *Focus on Files, Attachments and the Catalog Dashboard* guide.

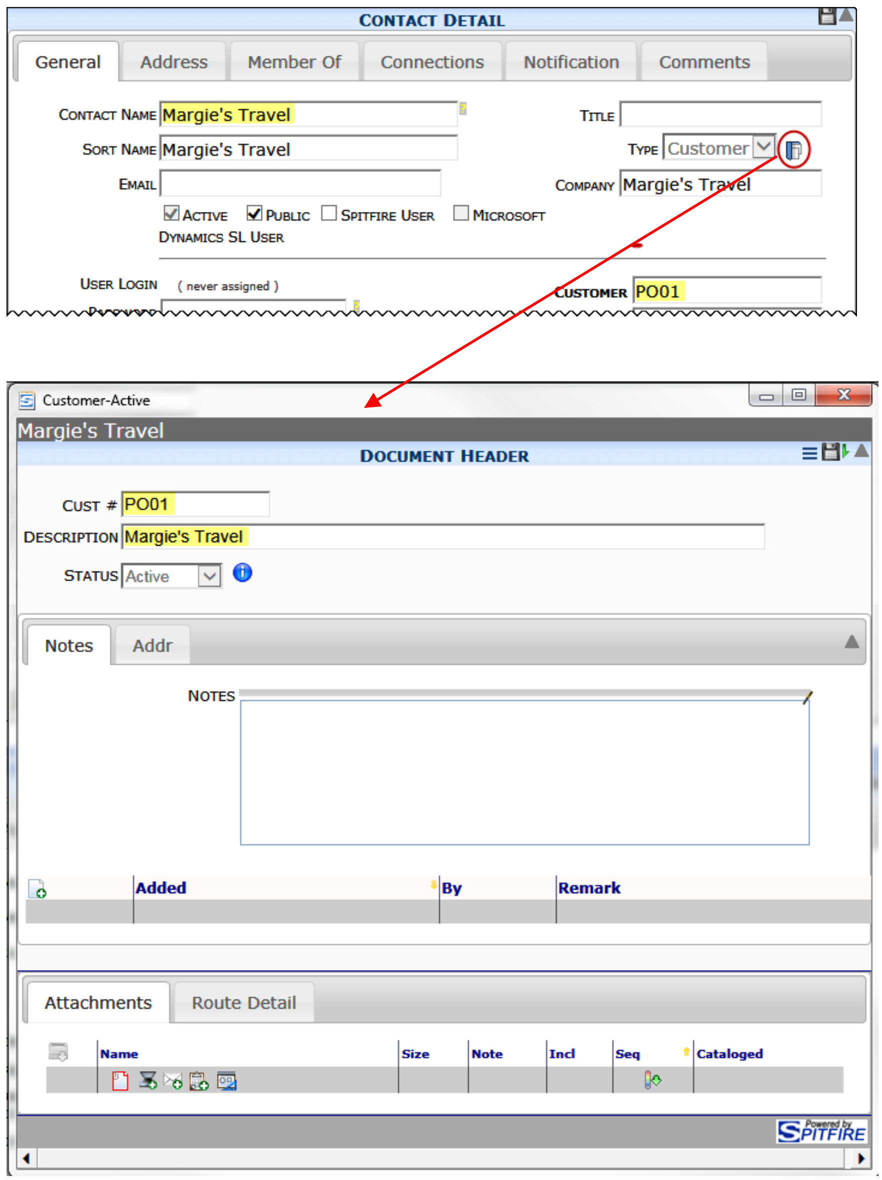
Route Detail is described in the *Focus on Routes* guide.

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

- Save the document to enable the Attachment options.

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.

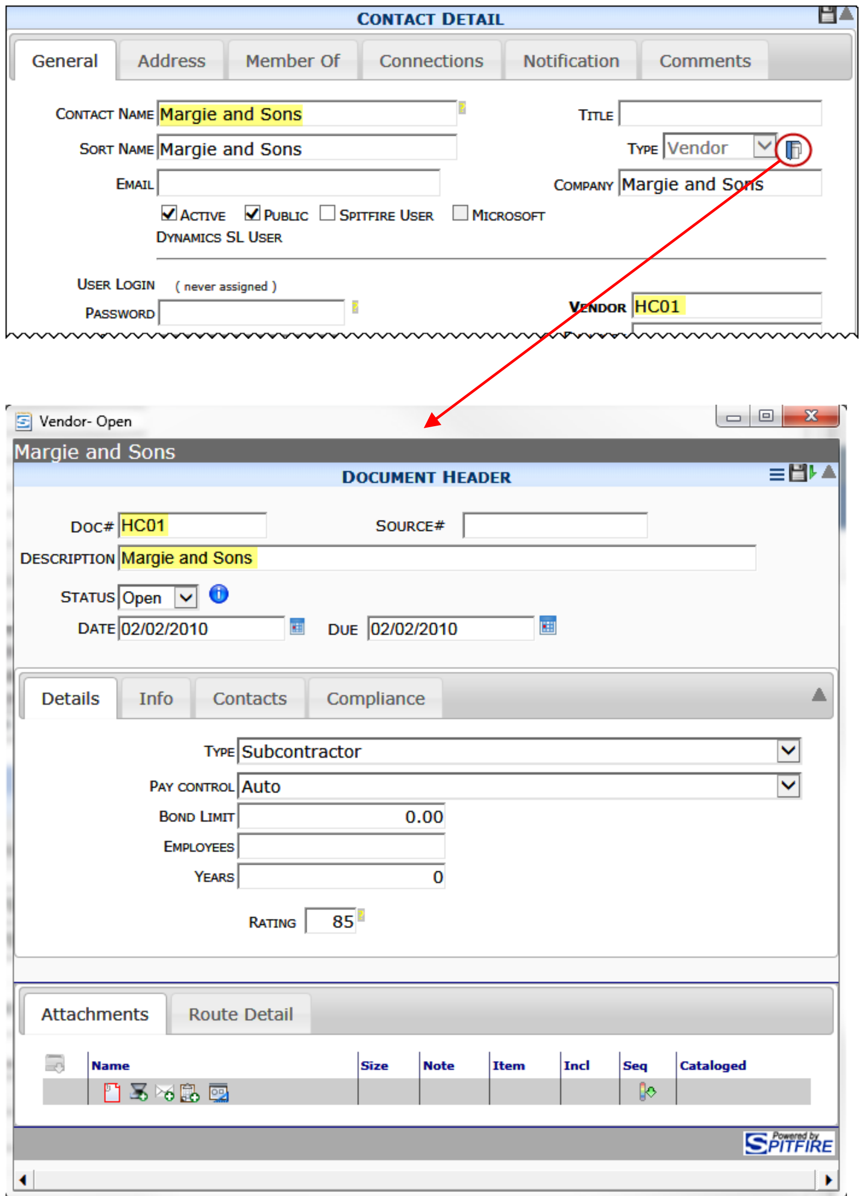


TIP

The Document Options menu and the mid-section tabs (Notes and Addr) on a document are described in the *Focus on Document and Item Basics* guide.

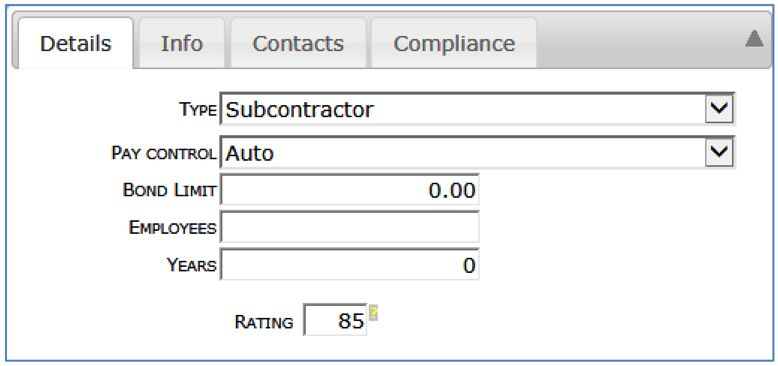
Vendor Document

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.



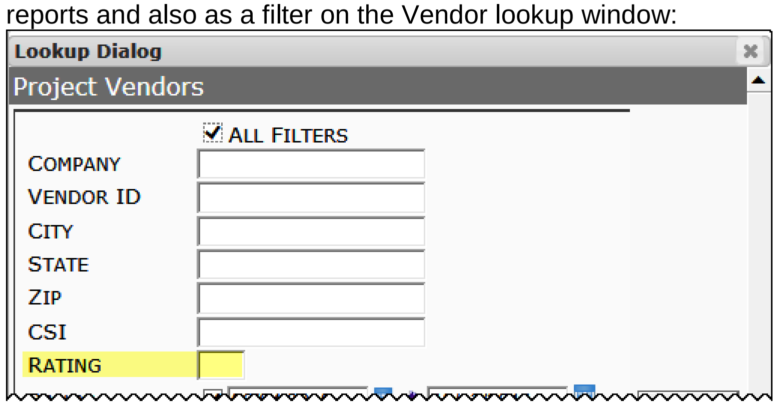
Mid-section Tabs

Details

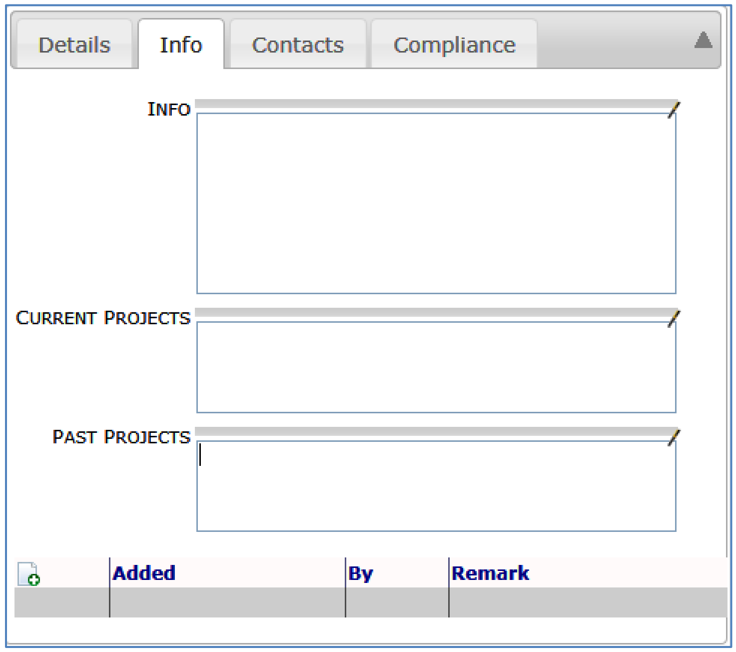


Select the type of Vendor from the **Type** drop-down.

- If you have set up Compliance for your site (as described in the *Focus on Alerts and Compliance* 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:

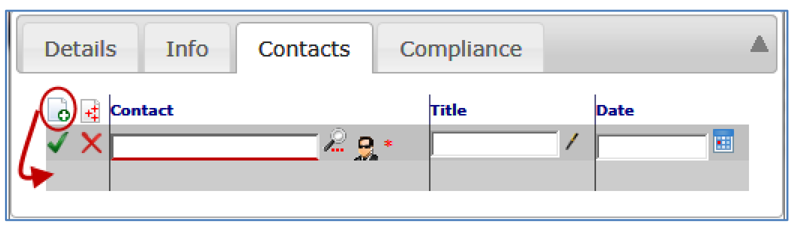


Info



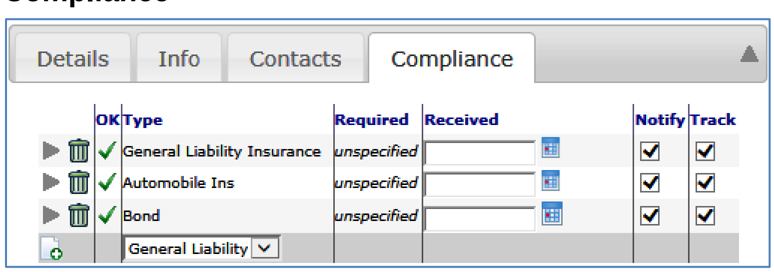
- Enter notes in the **Info**, **Current Projects**, and **Past Projects** fields as desired.

Contacts



- Click then to look up and select a Contact to include on this list.
- Click then to add a freeform name not in your Contacts.

Compliance



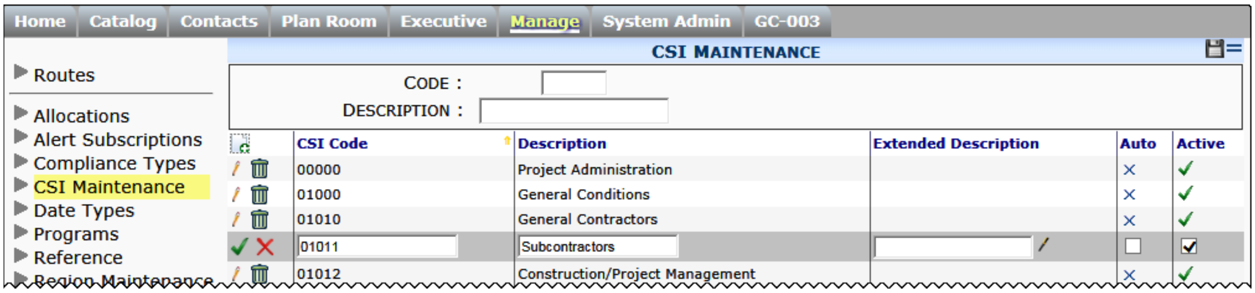
For information about the Compliance tab, see the *Focus on Alerts and Compliance* guide.

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.

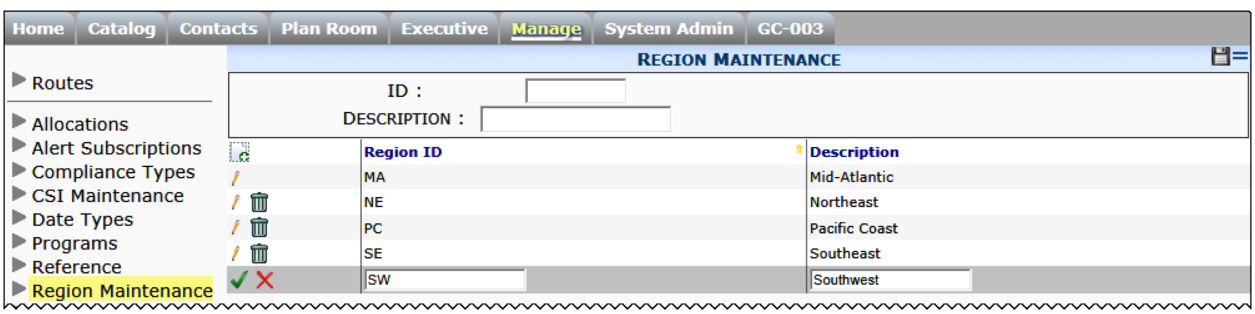


CSI codes are assigned to companies through the CSI tab on the Company Detail window. See page 22.

For more information about the CSI Maintenance tool, see the *Focus on the Manage Dashboard* 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."



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

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