

CHAPTER 27 – CONTACT MANAGER

27.A

Introduction to the Contact Manager Window

The Contact Manager window is the central administrator for your Fire Department's contacts.

You can make use of its capabilities in four ways.

- 1) It can be used to record and store information and notes regarding your contacts. These can be added to or edited at any time.
- 2) Contacts in Contact Manager can be marked to be used as suppliers for Purchase Requests (Chapter 23). Contacts that are identified in Contact Manager as Suppliers will appear in a pop-up menu on the Purchase Requests window under Suppliers.
- 3) The Contact Manager feature is linked to Account Transactions (Chapter 22). All contacts entered in the Contact Manager will show up in the Payee list.
- 4) Contacts in the Contact Manager can be marked to be used as contacts on the building department permit window (30.C.TABS.30.a).

27.B

The Contact Manager Window

To access the Contacts window, go to:
FirePro 2 → **Contact Manager**

| FirePro 2 | Reports | Set-up | Maintenance |
|---------------------------|---------|--------|-------------|
| Properties | | | Ctrl+1 |
| Fire Fighters | | | Ctrl+2 |
| Standby Assignments | | | Ctrl+3 |
| Meetings & Training | | | Ctrl+4 |
| New Non-Property Incident | | | |
| Find Incident Report | | | ▶ |
| Find Inspection | | | ▶ |
| Find Inspection Checklist | | | |
| Building Permits | | | ▶ |
| Accounting | | | ▶ |
| Daily Personnel Rpt | | | |
| Daily Log | | | |
| Contact Manager | | | |

Contact Manager X

All Contacts Click on a title to sort by that column

| Business Name | First Name | Last Name | Category 1 | Category 2 |
|----------------------------|------------|-----------|------------|-------------------------|
| Acklands-Grainger | Dave | Power | Suppliers | Fire Fighting Apparatus |
| Bell Canada | | | Utilities | |
| Brian's Footwear | Brian | Lespelds | Suppliers | Clothing and Footwear |
| Canadian D.C. Systems Inc. | Willie | Wanka | Suppliers | Fire Fighting Apparatus |
| M & L Supplier | Carol | White | Suppliers | Clothing and Footwear |
| | | | | |

Primary Category: Suppliers **Secondary Category:** Fire Fighting Apparatus

Name:
Contact:
Address:

Phone/Fax:
E-Mail:
Notes:

Show All

| | |
|--------|--------|
| Find | Print |
| Add | Edit |
| Add + | Delete |
| Cancel | OK |

Supplier
 Bldg Dept.

The Contact Manager Window Fields

(COLUMN HEADINGS) BUSINESS NAME, FIRST NAME, ETC

Click on any of these titles to sort the contact list by that column.

PRIMARY CATEGORY & SECONDARY CATEGORY

You can sort your contacts into categories by assigning a Primary and a Secondary category to each contact.

To create categories, see



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SHOW ALL (DROP DOWN LIST)

You can choose to show all contacts, or only show contacts with a specific category.

SUPPLIER

Click in the Supplier Check Box at the bottom of the Contact Manager window to identify a contact as a supplier. This will add their name to the Supplier list in the Purchase Requests window.

BLDG. DEPT.

Click the Bldg Dept. Check Box to identify a contact as a Building Department contact. This will add their name to the Name list drop-down in the Contacts tab of the Permit Application window.

The Contact Manager Buttons

27.D.20



The Find Button allows you to search for data from any of the available fields in the Contact Manager window (see [27.G.20](#)).

27.D.30



The Print Button allows you to print a report ([27.R](#)) listing all of the contacts in the list.

27.G.20

Finding A Contact

To locate a contact record, click on the Find button ([27.D.2](#)) and enter your search phrase in the Dialogue Box then click OK. The program will look for whatever you type here – all fields in all contact records are considered.

 A screenshot of a search dialog box. At the top, a dark bar contains the text "Enter the word or phrase to search for". Below this is a text input field containing the word "footwear". Underneath the input field is a dropdown menu labeled "From:" with the selected option "<All Contacts>". To the right of the input field and dropdown menu are two buttons: "Cancel" and "OK", stacked vertically.

Note that all fields (including "Notes") in all records are considered in a search. So even if the business name does not include the word "Footwear", businesses would be found if the word footwear is somewhere in their record.

Note:

If you want to find a record by the person's name, enter either the first or last name in the dialogue box. First and last names are entered as two separate fields so they cannot be found simultaneously.

Reports

The Contact Manager Report is accessed through the All Contacts List window. (27.G.10).

| JAN 19 06 | | |
|----------------------------------|-------------------|------------------|
| For Demonstration Only | | |
| Fire Chief: Fire Chief | | |
| 1234 Main St., Your Town L0S 1M0 | | |
| Business Name | First Name | Last Name |
| ABC Contact | Jimmy | Smith |
| ABC Footwear | | |
| Acklands-Grainger | Dave | Power |
| Bell Canada | | |
| Brian's Footwear | Brian | Lespeids |
| Canadian D.C. Systems Inc. | Willie | Wonka |
| M & L Supplier | Carol | White |