

Contacts

Summary:

The Contacts Screen was based upon the Contact business component. Customization was necessary to meet the client's requirements. Several new fields were created to facilitate the intake of all necessary Contact information. Also, new picklists were created for several of the new fields. The link between the Contact and Account address information was removed, allowing a completely separate Contact address to be captured. Pick Maps were added to the Contact views to automatically populate certain fields, eliminating the need for duplicate data entry. Many of the Contact fields are populated with data from the same type of fields in Account, but the user has the ability to overwrite the data if necessary. Two new views, Contact Partners and Contact Customers, were added to the Contacts Screen. These views filter the Contact list based on the Contact Type values of Partner and Customer. All other views on this screen were copied from Siebel Vanilla, except for use of the name 'Cases' instead of 'Service Requests.'

Data Mapping:

For a detailed data mapping summary, please refer to Appendices A9-A10.

Picklists:

The following is a list of new picklists that were added for the OCTS 2.0 system.

- Suffix
- Contact Type
- Relationship/Title
- Contact Method

For a list of the values in these picklists, please refer to Appendix B4.

VB Code:

Code Summary: No VB Code was added to the Contact screen.

Charts:

Title: Number of Contacts by Contact Method

Business Component: Contact

Chart Summary: Displays number of contacts (Y) categorized by the contact method (X).

Title: Number of Contacts by Contact Type

Business Component: Contact

Chart Summary: Displays number of contacts (Y) categorized by the contact type (X).