How to make a contact event – letter, email, phone call, etc.

A contact event is a record of meetings, letters, telephones call, Email or any other form of contact.

Notes:

- Where you are when you make a contact event affects the links that can be made. To be linked to a vacancy the contact event has to be initiated from the Vacancy form, etc.
- Contact Events can be made from most forms and selectors - Company, Person, Desk Top, Vacancy, wherever you have a person selected.
- Select a Person and click the **Contact Event** button.
- Select the Type of Contact from the drop down list, as set up in Maintenance.
- Enter a summary of the Contact which will show in Contact Events tables and as the default Subject for an email.
- Enter Text Message or Notes or use **Write Letter** button to bring up Templates and Word.
- If the letter is saved it will appear on the Letter Tab in read-only form but it can be re printed with the **Edit/Print Letter** button and edited if Contact Event editing is allowed.
- An Outcome can be selected. This will show in Contact Events tables and is useful for reporting.
- If a date is entered in the Call Back Request box it will appear on that date and thereafter on the user's list of Contact Events Due for Callback in the Desk Top or Contact Events Selector.
- To send as an email use the **Email** button, accept or change the address and Subject Line, attach items if required and **Send**. (Attached items must not be currently open in the background)
- To fax or SMS, if the Agency has the required telephony capability and settings, use the appropriate buttons.

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