Contacts

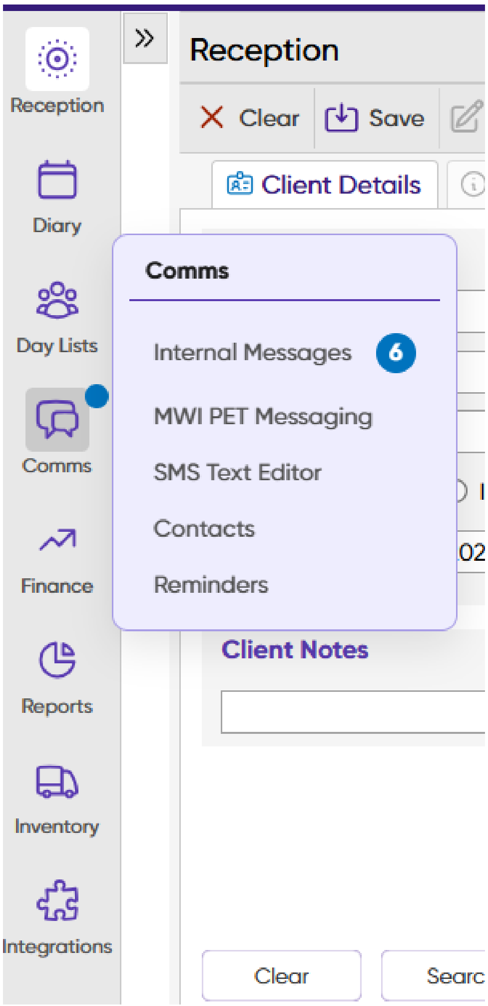
04/08/2025 8:59 am BST

Summary

The Contact screen facilitates the registration of contacts who are not clients (Your RCM, X-ray machine servicing company etc.)

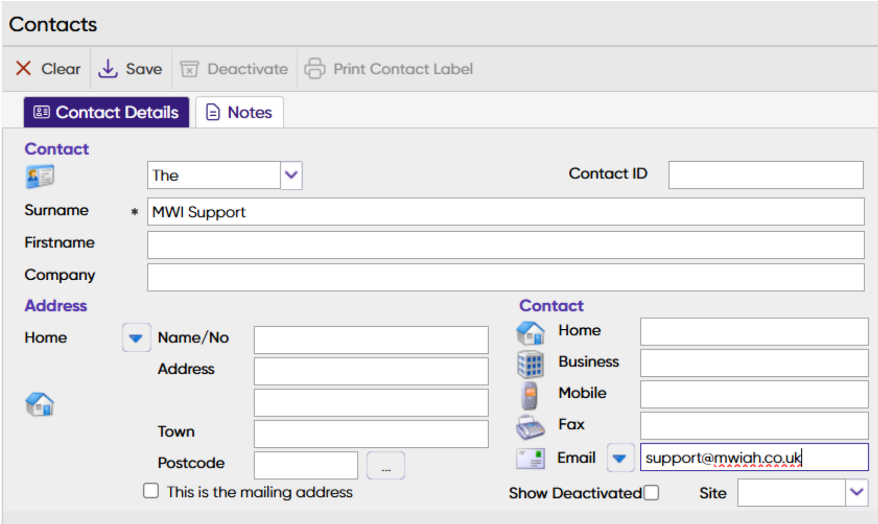
Details

The Contact screen can be accessed via the Primary Navigation > Comms > Contacts.

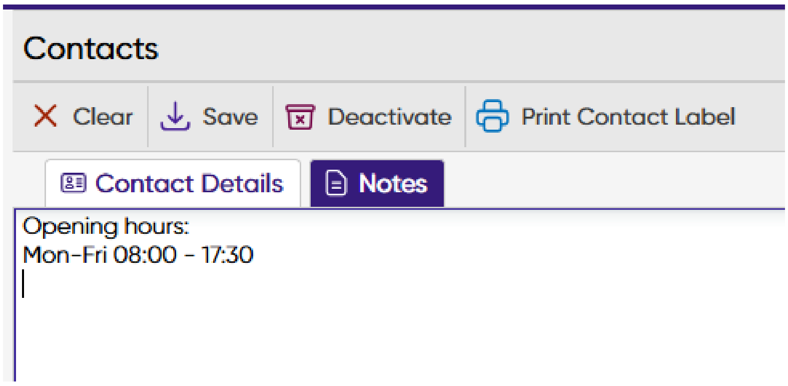


Registering a Contact

The Registration of a Contact is carried out using the below fields, (similar to those used when registering a Client).



1. Select the 'Clear' button (unless the screen is clear already).
2. Select a 'Title' for the contact from the drop down menu.
3. Fill in all the required information such as Surname, First Name and Company along with the Addresses and Contact information.
4. Verify the information is correct and click the 'Save' button.
5. *Tip: To move to the next text field, you may select with the mouse or use either the tab button or the return button/enter button on the keyboard.*
6. Once the Contact has been saved you can now use the Notes button to add any information or notes for the Contact.



Searching for a Contact

To search for a Contact, you can search by any of the Contact details provided (Similar to searching for a Client).

1. Search using any of the information fields.
2. Select the Contact from the list presented.
3. Selecting this Contact will bring up their details.

Deactivating a Contact

1. Search for and select a Contact.
2. Select the 'Deactivate' button

Note - Once a Contact has been set as deactivated, users can still search for them by selecting the ‘Show Deactivated’ button. Deactivated Contacts will display in a light blue colour.

Printing a Contact Label

1. Search for and select a Contact.
2. Select the 'Print Contact Label' button