## *Secondary Contacts*

Secondary Contacts are alternate Contacts that have some relationship to the current (or primary) Contact. They are maintained on their own tab on the Contact's record. While you may have an unlimited number of Secondary Contacts, generally these alternate names are maintained only for information purposes. Usually, these Contacts would have no impact on the decision making process to use your company's products or services. However, it is sometimes useful to maintain a list of associates that could be helpful to you…the contact's assistant, a person in accounts payable who has helped you get your bills paid in the past, shipping personnel who can check on status of packages delivered, etc.

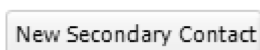
Basic information can be maintained on each Secondary Contact, including their title, phone, mobile, fax, e-mail and web address. You need not fill in the company name and business address unless it is different from the main contact's information.

☞ *Keep in mind that you may **not** maintain notes or schedule activities with Secondary Contacts. All notes, histories, scheduled activities, and opportunities will be associated with the primary Contact only.*

***Procedures:*** ***To add a Secondary Contact***

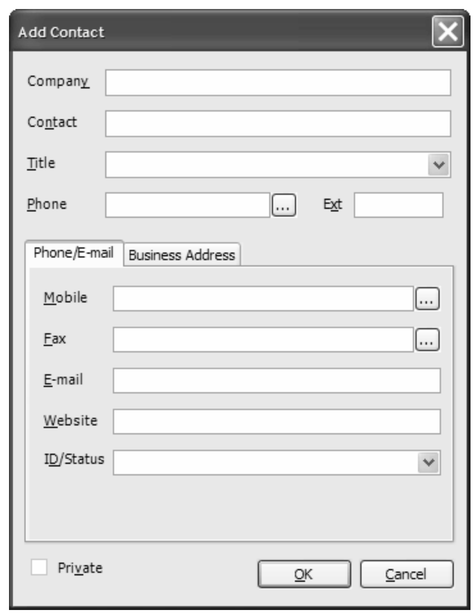
1. On the Contact's record, click the **Secondary Contacts** tab.


2. Click **New Secondary Contact** button on the tab.




or

right-click in the tab and select **New Secondary Contact.**




3. Fill in the data as desired. — Place a check in the **Private** checkbox to make this Contact private.

4. **OK** — All Secondary Contacts will display in alphabetical order by last name.

☞ *The display of Secondary Contacts is a list view. If you would like different columns of information to display for these Contacts, you can customize the list the same way that you customized the Contact List view. See page 45.*

Double-click a Secondary Contact to display the complete information. Notice that Secondary Contacts can have their own e-mail addresses and websites, which are hyperlinked when displayed in the dialog. That means you can click on the e-mail and it will open a new message window for sending e-mail. The web site is also hyperlinked and when clicked will display the site in your default internet browser.

☞ *We've also used the Secondary Contact feature to store site specific web addresses for quick access to their customer login site.*

***Procedure:*** ***To delete a Secondary Contact***

1. On the Contact's record, click the **Secondary Contacts** tab.
2. Right-click on the contact to delete and select **Delete Secondary Contact**
3. Click **Yes** to confirm the deletion.

### *Mini-Exercise: Assistants*

| Step | What to do | How to do it/Comments |
|---|---|---|
| **1.** | James Penney got a new assistant. Add him as a Secondary Contact:<br>Joe Boxer<br>972-431-1892 | Lookup, Last Name, Penney, OK. Click on the Secondary Contacts tab and click the **New Secondary Contact** button on the tab header bar. Add his name, title, and phone and click **OK**. Right-click and delete the old Assistant if you like. |
| **2.** | Lookup William Randolph Hearst (American Newspapers). Let's add some Secondary Contacts to his record that reflect some of the Newspapers that he owns, along with their associate web sites.<br>Enter the paper names in the Contact field…<br>San Francisco Chronicle<br>www.sfgate.com<br>Houston Chronicle<br>www.chron.com | Lookup, Last Name, Hearst, OK. Hmmm. Duplicates. We'll deal with those later. For right now, select the American Newspaper record.<br><br>On the Secondary Contacts tab, click the **New Secondary Contact** button. In the Contact text area enter the name of the newspaper. In the web site area, enter the web address, click OK. Repeat for the second newspaper. |
| **3.** | Double-click one of the newspaper names and click the web address to see it display in your web browser.<br>Close your Internet window and then close the Secondary Contacts window. | |