# Creating a new Contact

## Select the **Contacts** tab and click **New**

## Enter as many details as possible following any data entry standards your firm has in place

## **Company Name** – enter the contact’s company name and select the relevant company from the options provided

## If the company doesn’t already exist in OnePlace, click the **New Company** option to create the company first



## **Address** – use the **Search Address** option to easily find an address



## When all fields are complete click **Save**

Note that fields marked with a red asterisk are mandatory.

Note: You can also create a contact from a company record, this will ensure the contact is associated with the correct company:

Find the Company record, select the Related tab, expand the Contacts section and click **New.**

# Editing Contacts

Search for the relevant contact and click the pencil icon in field you wish to update > edit as needed > click **Save**.

You can also click **Edit** at the top of the page to make changes to multiple fields:



Click **Change Company** to update the company a contact is linked to. Delete any old information e.g. job title, email or phone by clicking  next to the field(s).

#  Viewing Contacts

You can quickly find recently viewed contact, newly added contact and other lists set by your firm.

## Click the **Contacts** tab

## Make a selection from the filter drop down



## Reorder the list by clicking on a column header, the first click sorts Ascending 🡩, the second click reorders Descending 🡫



# Viewing Contact Information

## Click a contact’s name to view full details.

When viewing a contact, you will see the following information available:



**Key contact details** are displayed at the top of the page.

**Action buttons:**

* **Follow** the contact on Chatter
* **Edit**
* **Change Company** (under drop down arrow) – update the company this contact works for

**Tabs:**

* **Details** – shows full contact details, contact preferences and marketing activity summary
* **Related** – shows you other companies the contact is linked to, other addresses recorded, lists, functions and publication information
* **Relationships** – allows you to view and create relationships with this contact
* **Areas of Interest** - can be populated by users or by the contact directly using emarketing integration
* **Data Quality** – shows potential duplicates and a Data Verification tool available subject to a licence
* **Activities** – record new activities. View and filter existing activities
* **Chatter** – comment on this contact – comments will be pushed to other users following this contact but visible to anyone viewing the record

# Working on behalf of your fee earner

Click **Work on Behalf** in the bottom left corner of your screen to search for the fee earner you want to work as:



This will allow you to add Contacts, Activities, Relationships etc as your fee earner.

To go back to working as yourself click **Reset**:



Note: changes made to contact details will display your user name in the Contact History section regardless of who you are working as.

# Viewing Marketing Information

When viewing a contact, select the **Related** tab:

The **Events and Training** section will show all events the contact has been invited to, their response and attendance.

The **Publication Subscribed** section will show you any newsletters sent to the contact and how many times they’ve clicked a link within the newsletter (if you have integration with your emarketing system).

# Adding a Contact to a List

Lists are used for events and newsletters – you can add contacts to a list for them to receive an invitation or publication. The marketing team will send you a link to allow you to add your contacts to a list. The link will show you:

## Guidelines on the type of contacts that should be added > click **Contribute Contacts to List**

## **Add Contacts** screen will allow you to view contacts:

* **I work with** – contacts you are linked to via a matter
* **I know** – contacts where you have a knows relationship recorded
* **I added to list**
* **Others added to list**



## Select the contact you want to add to the list

## Click **Save and continue** **later** OR **List Completed**

# Adding Activities

Activities are used to record what we are doing with contacts and companies e.g. business development meetings and phone calls. They can be added directly from your Outlook calendar and inbox via Lightning for Outlook.

You can also create new activities in OnePlace:

## Click the **Activities** tab on a contact or company and select **New Task** – to record a meeting or to assign a task to yourself or another person

## Complete the following details:

* **Subject** – heading for the task/meeting
* **Related To** – click on the drop down to relate the task to a company, matter, publication, event etc
* **Name** – click on the drop down to search for the contact related to this task
* **Comments** – for extra information
* **Type** – select the relevant type from the drop down list: Call, Meeting etc
* **For tasks:** **Assigned to** - will pick up your details (or the person you’re working on behalf of), you can amend this to set a task for another user
* **For tasks: Due date** – enter the date the task is due to take place
* **For tasks: Status** – can be updated as the task progresses: Not Started, In Progress, Completed, Waiting on someone else, Deferred

## Click **Save**

The Status of the task will determine if it is visible in the Next Steps or Past Activities section.

**Next Steps:** Not Started, In Progress, Waiting on someone else, Deferred

**Past:** Completed

# Adding a Relationship

When you add a contact to OnePlace, a **known by** relationship is created between you and the contact.

You can also add this relationship to contacts which are already in the system by clicking **I know This Person** at the top of the contact page:



You can easily find these contacts by selecting the **My Contacts** list view on the **Contacts** tab.

You can also build other relationships between contacts and/or companies:

## Search for the relevant contact and click the **Related** tab

## In the **Relationships** section click **New**

## Select the relevant relationship type (Board Member, Consultant, Member of etc)

## Click **Next**

## Search for the related contact/company/user – depending on the relationship type selected

## Click **Save**