

VisionR Module

People / Contacts



Provides functionality to manage people and companies with contact details. Allows organizing persons in departments as well as assigning them a specific function within the managed enterprises. Company contacts for customers, vendors, manufacturers etc. are managed with multiple addresses, contact persons, bank accounts etc.

Description

The VisionR module "People / Contacts" is used to manage contacts online.

Contacts can be managed in different languages simultaneously.

Different types of contacts (vendor, customer, manufacturer etc.) can have different types of properties. Company and person data can be linked in any other VisionR module.

The basic version of this module is included as VisionR built-in module.

Functional overview

- contact management of people and companies
- company department structure (for many companies simultaneously)
- management of bank accounts
- contact persons for the managed company contacts
- contact management in different languages possible
- name and status changes of people and companies are saved
- status overview for companies and people
- people data is linked to the VisionR user accounts
- a person can have multiple user accounts
- person and company addresses in multiple locations

Options

- Linking of company data with tenders, offers and invoices, providing full cost overview
- Leads management - contact notes with calendar overview

Technical details

- all people and company properties can be adjusted to the customer's needs
- layout changes are possible
- automatically generated e-mails on people / company changes possible
- complete internationalisation
- people and company types are extendable
- standard interfaces for contact data exchange with other databases

User roles

- **Everyone**
has read access to people and companies;
has write access for his own personal information
- **Module user**
has access only to contact data for the used module
- **People administrator**
can change all people data
- **Company administrator**
can change all company data
- **Administrator**
can change all people and company data