



# Contact Management

## eWay-Book

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## Introduction

eWay-CRM® helps companies worldwide be truly effective. Some businesses are trying to get better in managing projects, other in managing sales activities. However, alpha and omega is always a rigorous database of customers and their contacts, regardless of working in B2B or B2C. Some say B2B is an illusion – at the end of the day, you always communicate with people.

That's why we at eWay-CRM® do our best to make our product a perfect tool for complex contact management. This eWay-Book focuses on how to grasp the issue.

## Contact Management vs. CRM

A Contact Management system is one of the vital parts of each and every CRM software. It allows recording and organizing information about contacts that the company needs daily in order to keep running. It helps the employees use their time effectively, as they don't need to look for phone numbers or e-mail addresses to get in touch with particular people. Opposed to a personal database (such as business cards or an Excel spreadsheet), this is a shared database accessible to anybody who needs it.

A CRM software goes further than this. Its job is to record this data and generate an added value from them for individual users, managers and of course – most importantly – clients. CRM software is able to help with sales, orders, marketing activities. It automatically keeps an eye on due dates, evaluates information and makes sure employees follow the company processes. A good CRM tool offers both simple and complex reports which can be used for strategic planning by managers.

## What is a contact and how is it different from a company?

A contact is a natural person, not a firm or any other legal person. In eWay-CRM®, we differentiate between a contact and a company. We have 2 modules for this – Contacts and Companies – and we keep the data separate. In some other CRM systems, you can see such terms as "Account" or "Client," contacts and companies are kept in one place. Not with eWay-CRM.

Of course there is a certain relation between a contact and a company. Usually, it is an employee relation, meaning one contact belongs to one company and one company can have more contacts.

In eWay-CRM®, we know how to manage one contact belonging to more companies, too. It can be an owner of more firms, a doctor working in more hospitals, or a lawyer representing more subjects.

## Why manage contacts in eWay-CRM®

Modern companies need to be very effective. The competition is peeking around the corner, waiting for your mistake. You simply cannot afford to spend time with unnecessary tasks, such as forwarding contacts or trying to find out whether a colleague has already spoken to a certain person. There are specialized tools for this and eWay-CRM® one of them.

However, there are many more reasons:

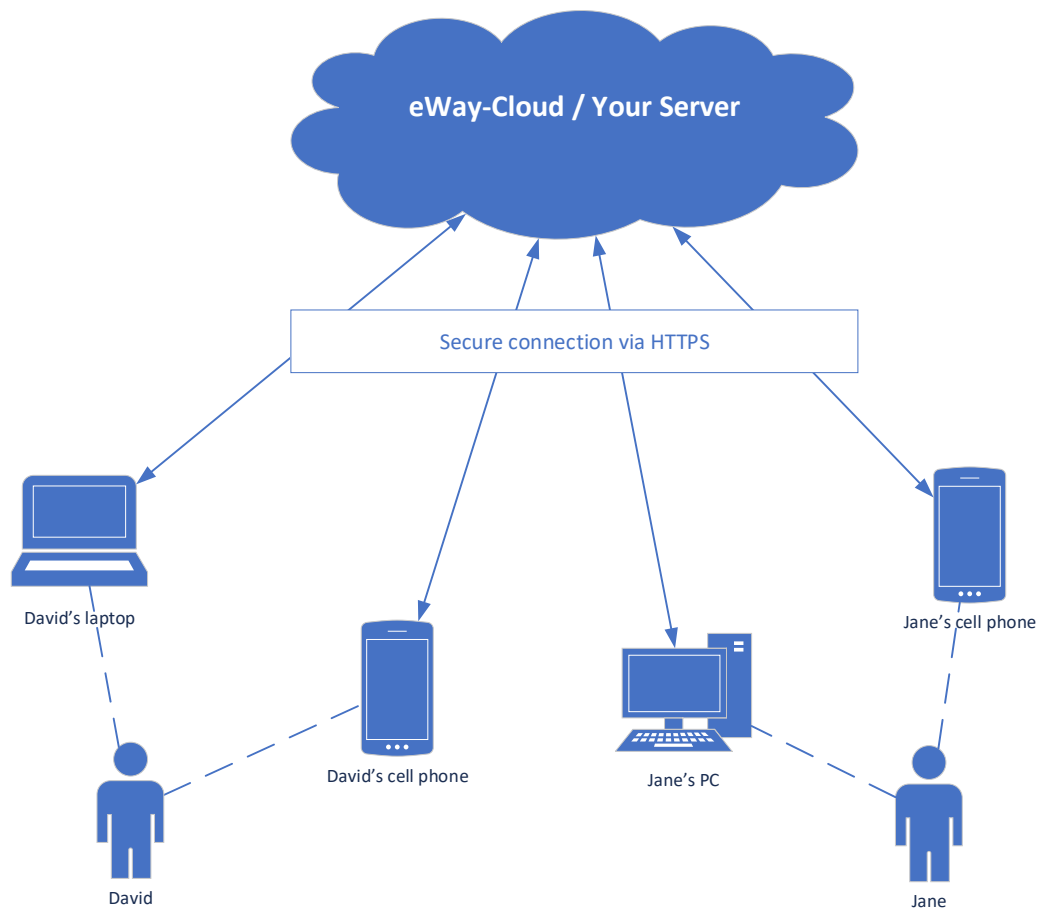
1. Contacts are in one place. It often happens that each employee has their own address book. Some use cell phones, some use Outlook contacts, some use Excel and sometimes a paper and pen or business cards are enough. Thanks to eWay-CRM®, the whole company has a single common tool, a single space where all contacts are available. For all. Thanks to that, people don't need to waste their time trying to figure out where the right phone number is. It's in eWay-CRM®. Full stop.

2. Contact are shared with colleagues. Any great address book is for nothing in the end, if it's not beneficial for all. Why should each employee manage their contacts separate? Why can't there be a common database where a technician can find a phone number given to a sales rep half a year ago? Why should everyone update a contact person in their address book every time it changes? Is it really not possible to do this just once so that everybody sees the change? It is. In eWay-CRM®. eWay-CRM® makes sure the new information reaches all.
3. Contacts are accessible everywhere and at any time. No matter if you are in front of your PC or on the go, your data are always accessible. Contacts can be accessed via eWay-CRM® for Outlook, eWay-CRM® Web Access or eWay-CRM® Mobile for both Android and iOS. This includes the possibility of inserting and editing. eWay-CRM® Mobile is able to connect with your phone's operating system so that when someone from eWay-CRM calls, you can see their name on the screen. Without the need to synchronize contacts to your phone using apps such as iCloud, Exchange, etc.
4. Contacts are all right thanks to a clear structure. Have you created a contact on your phone fast when coming from a business meeting and forgot to add a now needed e-mail address? Or did you open a client card with a "Peter"? What Peter? What is his last name? What is he in charge of? Of course, you can always ask your colleagues, but these are exactly the minor tasks that keep you from doing what's important. That's wasting time. With eWay-CRM®, it's easy. Our software has a feature for defining "mandatory" and "recommended" fields. That means the system notifies you in case it's missing something vital – a last name or an e-mail address, for example.
5. Contacts are automatically categorized based on companies. If you register companies at individuals, it is crucial to be able to quickly find out which people from the specific company are within your CRM. That allows you to plan and coordinate your activities better.
6. Contacts are safe. eWay-Cloud or your servers, encrypted connection, user permissions. We emphasize the importance of data safety as well as misuse protection. That's why we have prepared a safe storage as well as advanced possibilities to set user permissions. This comes in handy in case you need to manage access to individual contacts or to deny export.
7. Contacts are tailored to your needs. We want our software to be as easy as possible. Knowing that each company is different, we have made eWay-CRM® truly flexible. This way, everyone is able to adjust it to their own needs. Create custom fields to keep track of everything that's interesting. Use our form designer to "draw" the dialogue window in a way that fits your people the best. Adjust your drop-down menus.
8. Contacts comply with GDPR. eWay-CRM® complies with the European General Data Protection Regulation and allows you to collect and register consents or change requests. Everything can be tracked retrospectively. The system is also able to deal with the right for personal data erasure.
9. Contacts are also available via API. In case you need to access the CRM database from other systems as well, use eWay-API. This way, eWay-CRM® can be for example linked to your website. If a potential customer fills a registration form, his contact details will automatically appear in CRM.
10. Contacts can be used for loads of other things. eWay-CRM® contains lots of other features, such as bulk e-mails, automatic saving and categorizing of e-mails, the possibility to attach notes or documents to contacts. There is also advanced possibilities of registering deals and projects.

## How to manage contacts with eWay-CRM®

### Basic Concept

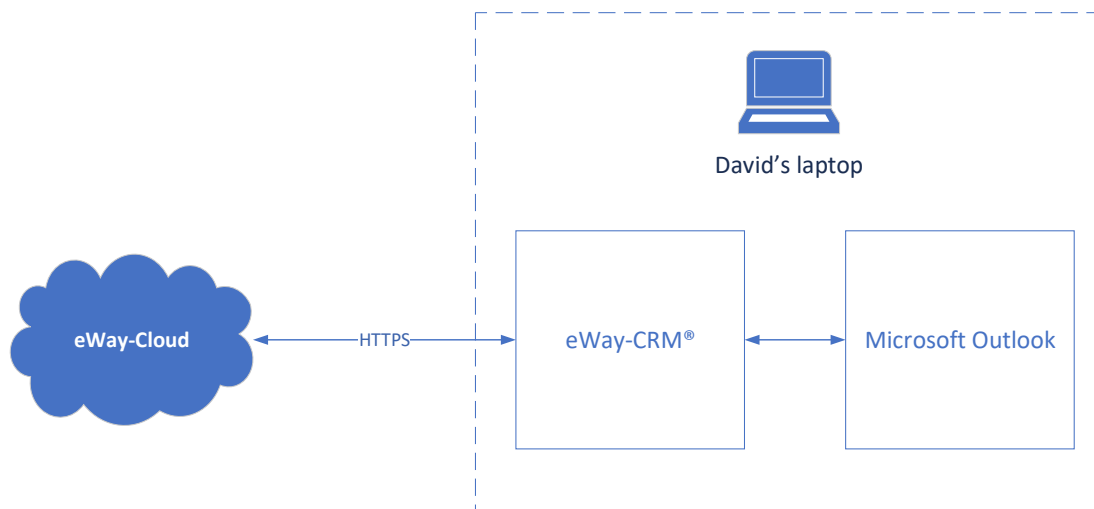
Contact Management in eWay-CRM® goes like this.



All data is stored in the server database of eWay-CRM®, which can be placed on your servers or on eWay-Cloud. All contacts are there as well. This is where they synchronize to individual devices from – David's laptop, David's smartphone, Jane's PC and Jane's smartphone.

Synchronization happens automatically and each device downloads only the contacts the user has permissions to view. Let's say David is a sales rep for the US. He will only see US contacts, not the contacts of Jane who is in charge of Canada. And vice versa.

Data always saves to the local eWay-CRM® database, no matter if it's the version for Microsoft Outlook or eWay-CRM® Mobile. From there, your data can be synchronized further, to Microsoft Outlook, or they can be made readable for operating systems Android or iOS. Thanks to the feature of contacts accessibility to the operating system of the phone, your device is able to determine when a client is calling. It then automatically shows their name on the screen.



*Note: Individual employees often have their contacts saved in Outlook, cell phone or another system. That's why it is necessary to transfer them to eWay-CRM® first. As it is very common that various employees have contact to the same people (often with different fields filled), it is smart to put the data together first. That's when Microsoft Excel comes in handy.*

## Basic operations

### Creating contacts

eWay-CRM® is here for filling in and managing contacts. This is the primary place for creating contacts and working with them further. It doesn't matter if you use eWay-CRM® for Outlook or eWay-CRM® Mobile. The important thing is that you don't create contacts straight in Outlook or a contact application in your phone. These are unable to keep track of data consistency, duplicating and permissions.

Depending on the politics of every company, new records can be put in either by everyone, or just the chosen users.

1. If it's desired in your company that anybody can insert contacts to eWay-CRM®, it is convenient to make sure the system doesn't create duplicities. The most common duplicity control is via e-mail address which is usually unique (more in [How to Eliminate Duplicate Records](#)). However, you can use any other index. In eWay-CRM®, any field can be indexed as Unique (more [here](#)).
2. If the situation is the contrary – only certain users need access to contacts, we can use the [Module permissions](#) feature and we set the permissions accordingly.

There are three ways to enter contacts:

1. Manually. This is a typical way of creating contacts in case a database has already been created in the company and a new person needs to be entered. Both eWay-CRM® for Outlook and eWay-CRM® Mobile can be used. More information can be found in chapters [How to Create Contacts Manually](#) (for eWay-CRM® in Outlook) and [How to Create Contact](#) (for eWay-CRM® Mobile).
2. By importing from Microsoft Outlook. Perfect for those who have a contact database in Outlook and need to transfer it to eWay-CRM®. The import mechanism takes care of data transfer and companies creation automatically, if desired. More information in [How to Import Contacts from Microsoft Outlook](#).

We haven't forgotten about private contacts either. In case you have friends and family in Outlook too, we can import data so that these don't get to the CRM database.

3. [By importing from Microsoft Excel](#). If you need to import data from other systems to eWay-CRM® (accounting system, ERP, Gmail, cell phones, ...), you will love our feature for importing from Microsoft Excel. In this case too, contacts are bulk dropped and eWay-CRM® automatically checks whether the mandatory fields have been filled and creates companies or categories. More information in [How to Import Contacts from Microsoft Excel](#).

Having your contacts in eWay-CRM®, you can start distributing them throughout the company or synchronize them into other apps (e.g. Microsoft Outlook).

## Editing contacts

We edit contacts inside of eWay-CRM®. That means the consistence is secured and we prevent conflicts with permissions. If you have an active Outlook synchronization, you can theoretically adjust the contact inside of Outlook (or your cell phone). However, a cell phone is not familiar with company politics. That means you cannot be sure that your contact will be saved into the CRM database correctly. It may happen that you adjust the record to a form which eWay-CRM® can't accept. Therefore you should only adjust contacts in eWay-CRM®. You may use both eWay-CRM® for Outlook and eWay-CRM® Mobile.

There is also a bulk edit feature using Microsoft Excel. Simply [export the data to Excel](#), bulk edit them (e.g. change the Owner, Note etc.) and import them back (see [How to Import Contacts from Microsoft Excel](#)).

## Contacts erasure

Contacts may only be erased in eWay-CRM® for Outlook. eWay-CRM® Mobile does not have this feature. It will then be automatically erased from the whole CRM database.

If your [GDPR function](#) is active, it will be erased forever, including all communication. So, be careful!

If you synchronize contacts with Microsoft Outlook and your feature for [Automatic contact erasure from Outlook](#) is active, the contact will be erased from Outlook, too.

## GDPR

eWay-CRM® is compliant with the European GDPR legislation. We have covered this topic in an [eWay-Book](#). You can find details about GDPR there, including advice on what to do when the subject wants to enforce their rights.

## Cell phone synchronization

The easiest way to synchronize contacts with a cell phone is via eWay-CRM® Mobile. The mobile app allows sharing contacts with the phone's operating system, so that in case of an incoming call, Android or iOS can automatically go through the eWay-CRM® Mobile contact database and show the caller's name.

How to activate the functions? Read [here](#) (for Android) and [here](#) (for iOS).

## Providing each contact with a person responsible

In order to clearly determine responsibility for each contact, we use the "ownership" function in eWay-CRM®. This is your employee who is in charge of the specific person. There can only be one owner, so that it's clear who takes care of the person – basically an Account manager.

An owner can be set [manually for each contact](#) or they can be bulk changed (see [Editing contacts](#)).



## Communication records (meetings and phone calls)

In eWay-CRM®, you can attach communication (notes from meetings or phone calls, e-mails, documents etc.). This way, you will have a complete history at each contact. Even on your cell phone!

All the data is automatically shared of course (according to the user permissions) and in case your colleague is unavailable at the moment, everything is saved in eWay-CRM®.

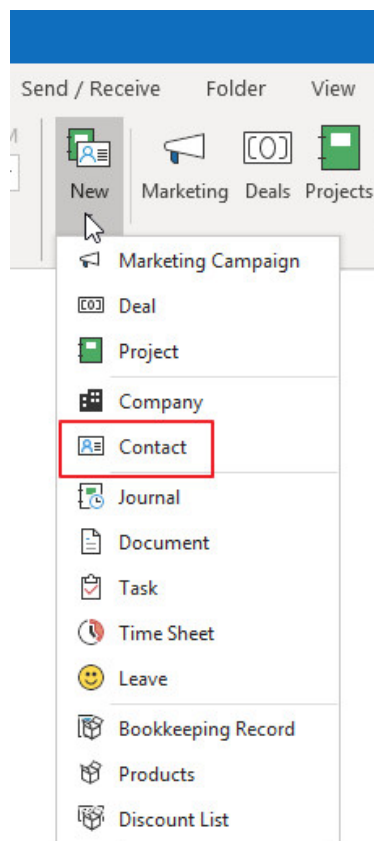
We have explained how to link e-mails to contacts in [this article](#). We use the Journals module for notes from meetings and phone calls. More information on how to record this kind of communication to be found [here](#).

## Manuals for eWay-CRM in Outlook

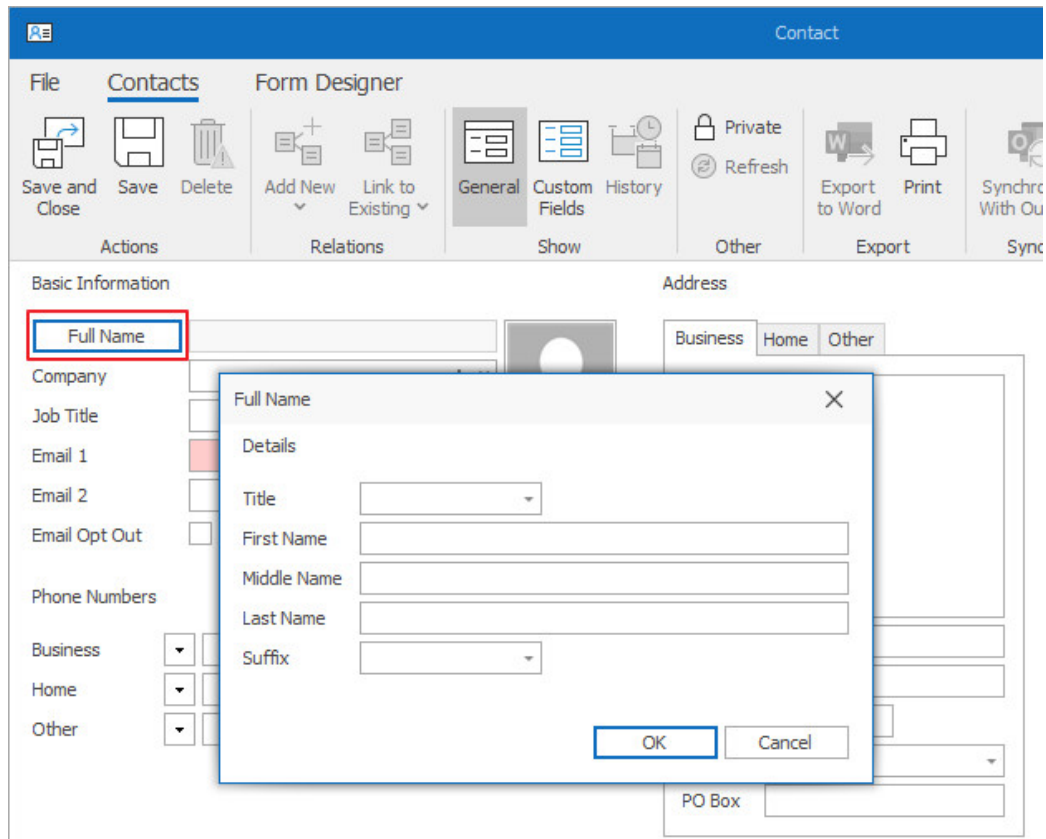
### How to Create Contacts Manually

When you need to create only one or small amount of contacts in eWay-CRM, the easiest way is to insert them manually. Please follow these steps:



1. Click **New** on the eWay-CRM ribbon and select **Contact**.

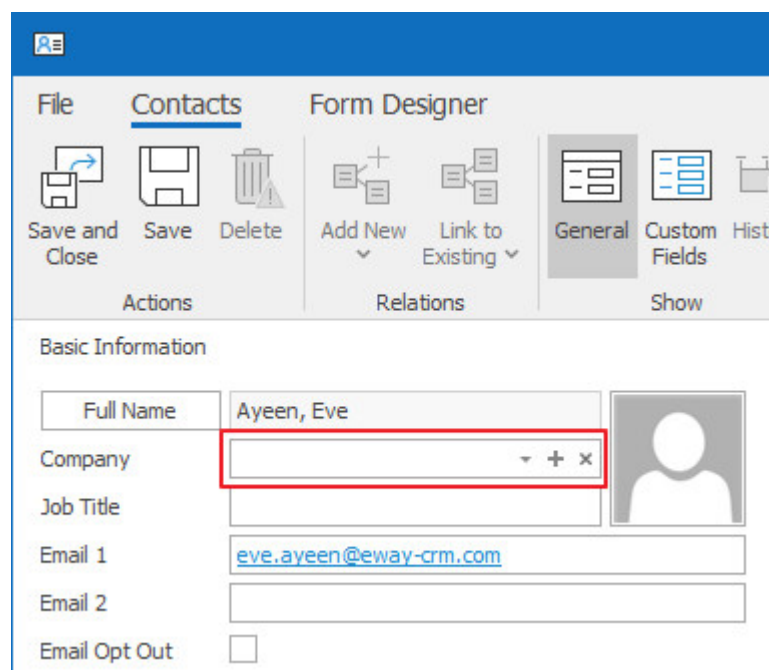


2. Click **Full Name** button to fill in First and Last Names and click **OK**.



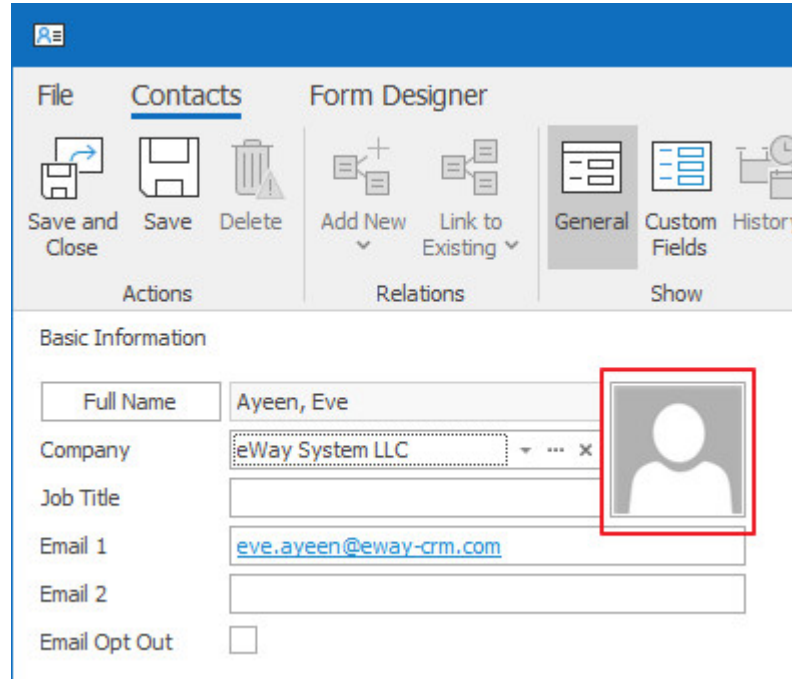
The screenshot shows the eWay CRM 'Contact' form. The 'Full Name' button in the 'Basic Information' section is highlighted with a red box. A 'Full Name' dialog box is open, allowing the user to enter details for the contact's name. The dialog box includes fields for Title, First Name, Middle Name, Last Name, and Suffix, along with 'OK' and 'Cancel' buttons.

3. You can select a company if it's already saved in eWay-CRM by clicking the  sign (in this case company's address can be copied onto the contact card automatically). If the company doesn't exist yet, you can create it by clicking the  sign.



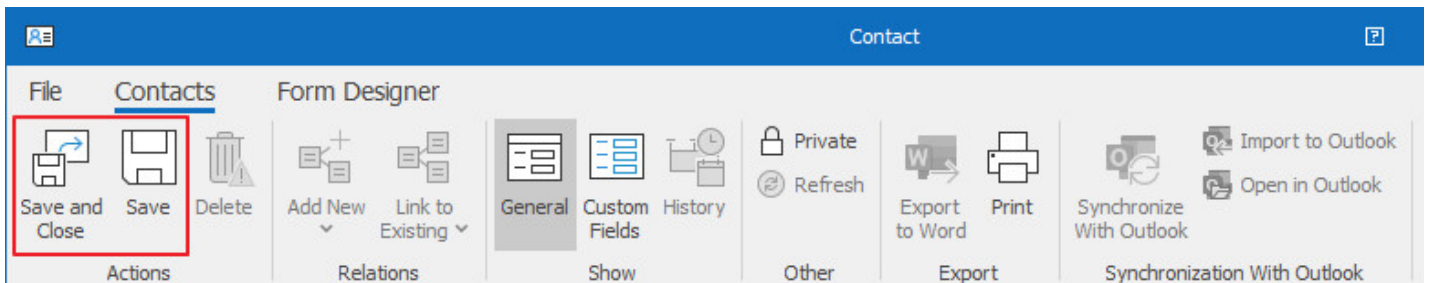
The screenshot shows the eWay CRM 'Contact' form with the 'Full Name' field filled with 'Ayeen, Eve'. The 'Company' field is highlighted with a red box, showing a dropdown arrow and a plus sign icon, indicating that a company can be selected or created. The 'Email 1' field is filled with 'eve.ayeen@eway-crm.com'.

- Specify other details such email address, phone number, job title, etc. You can also upload a picture of the contact by clicking the profile icon. (We recommend that you upload quadrate images of the same size for all contacts).



The screenshot shows the 'Basic Information' section of a contact form. The 'Full Name' field contains 'Ayeen, Eve'. The 'Company' field contains 'eWay System LLC'. The 'Job Title' field is empty. The 'Email 1' field contains 'eve.ayeen@eway-crm.com'. The 'Email 2' field is empty. The 'Email Opt Out' checkbox is unchecked. A red box highlights the profile icon placeholder.

- Once ready, click **Save** or **Save and Close**.



The screenshot shows the 'Actions' section of the contact form. The 'Save and Close' and 'Save' buttons are highlighted with a red box.

## How to Import Contacts from Microsoft Outlook

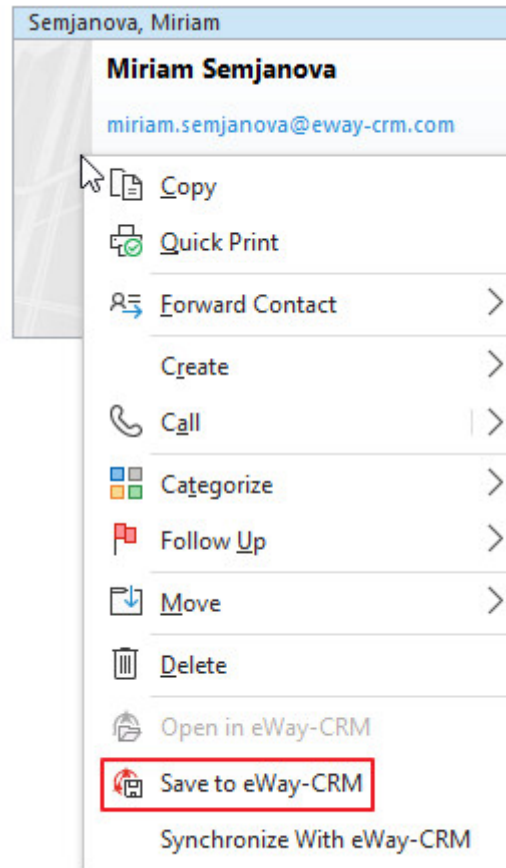
In case you need to import your contacts from Microsoft Outlook to eWay-CRM, you can use import or synchronization function.

Import will copy your contacts from Microsoft Outlook to eWay-CRM in one batch only once. If you want to activate the real time synchronization, contacts in Microsoft Outlook and eWay-CRM will be related and when you make a change on contact in eWay-CRM, it will be automatically synchronized to contact in Microsoft Outlook, and vice versa.

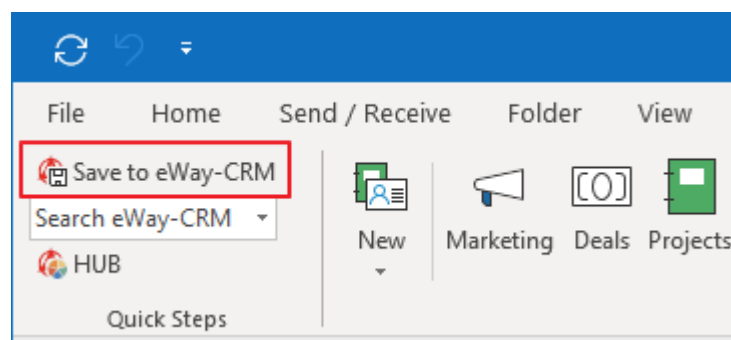
### One Time Import

- Open the contact list in **Microsoft Outlook**.

2. Select all contacts that you want to save to eWay-CRM (you can use **Ctrl+A** to select all). Right click on them and select **Save to eWay-CRM**.



Or click **Save to eWay-CRM** on the eWay-CRM ribbon in the top right corner.



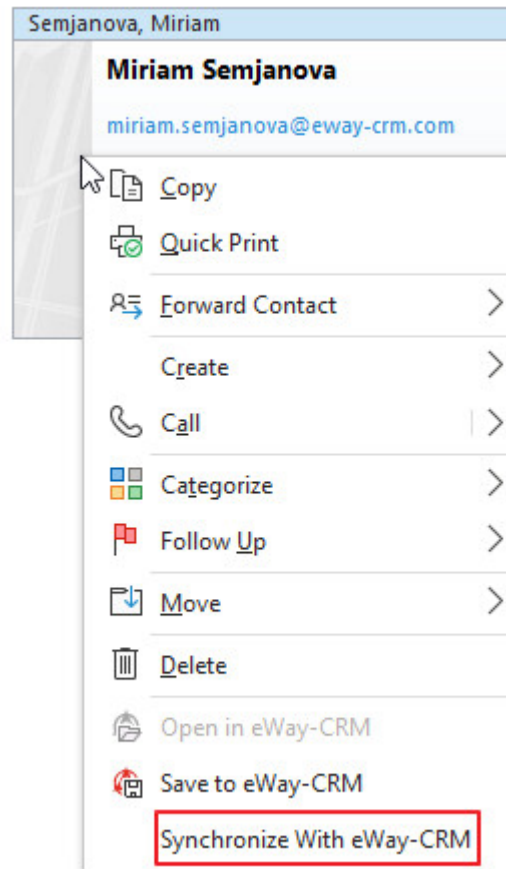
Now you can create new contacts directly in eWay-CRM.

## Synchronization

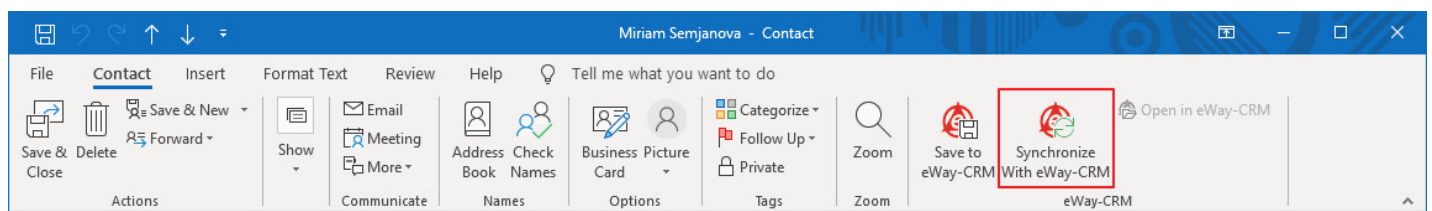
If you want to synchronize just some specific contacts, follow the instructions below.

1. Open the contact list in Microsoft Outlook.
2. Select all contacts that you want to synchronize with eWay-CRM (you can use Ctrl+A or Shift+A to highlight required contacts).

3. Right click on them and select **Synchronize With eWay-CRM**.



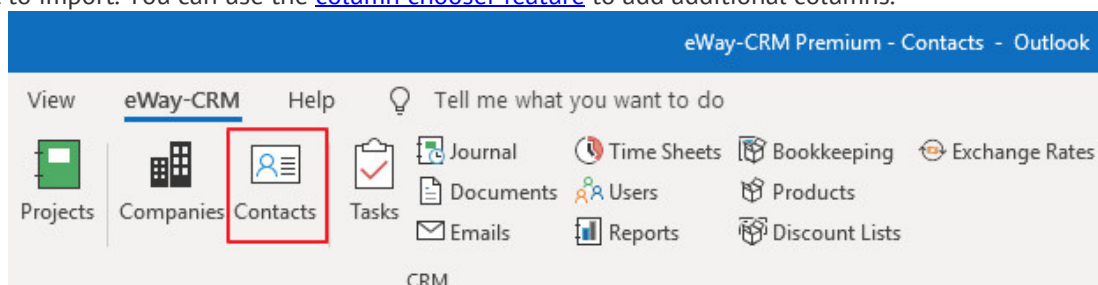
Or click **Synchronize With eWay-CRM** in the contact window in the top right corner.



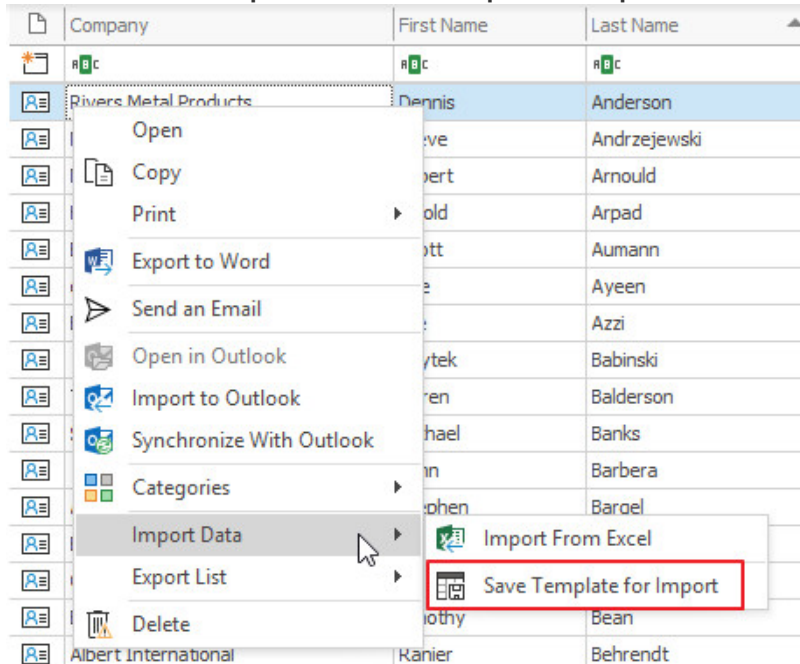
## How to Import Contacts from Microsoft Excel

If you need to move data from another database, you can use import of data from Microsoft Excel. Please, follow these steps:

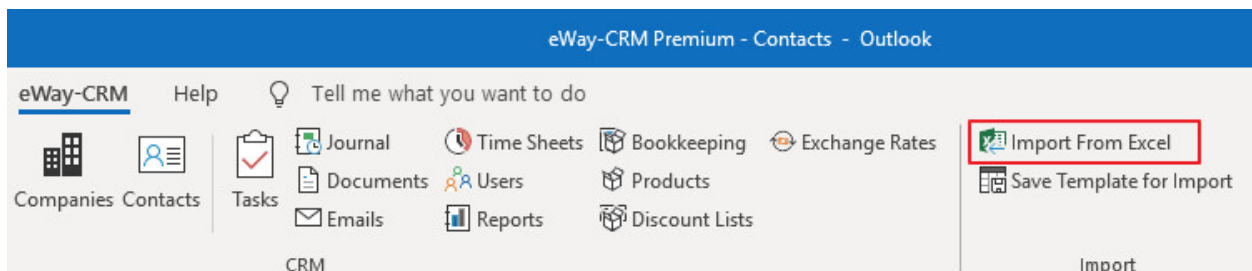
1. Click on the **Contacts** tab on the eWay-CRM ribbon. Customize the eWay-CRM view so it contains all the fields you want to import. You can use the [column chooser feature](#) to add additional columns.



- Right click on any contact and select **Import data > Save template for import**.



- Open the saved Excel file and fill it in with your data. Save the Excel file and close it.
- On the eWay-CRM ribbon, click on the button **From Excel**, load the table and import data.



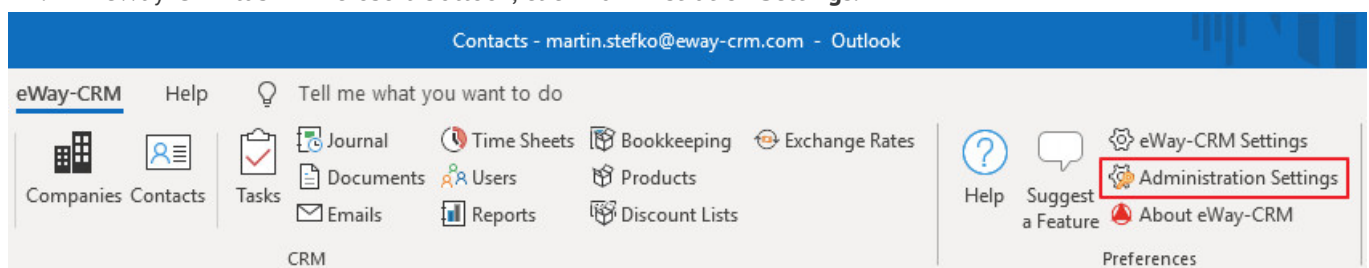
## How to Eliminate Duplicate Records

Duplicates can be created, and we know it, but eWay-CRM contains two elegant possibilities how to eliminate same multiple records.

### Check Duplicates by Email Address

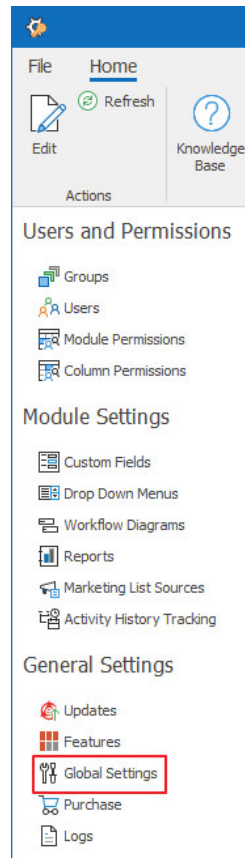
This setting automatically checks, whether email address of contact is not same as email address of different contact. If so, user is asked to fix it. For correct setting, please follow these steps:

- In eWay-CRM tab in Microsoft Outlook, click **Administration Settings**.

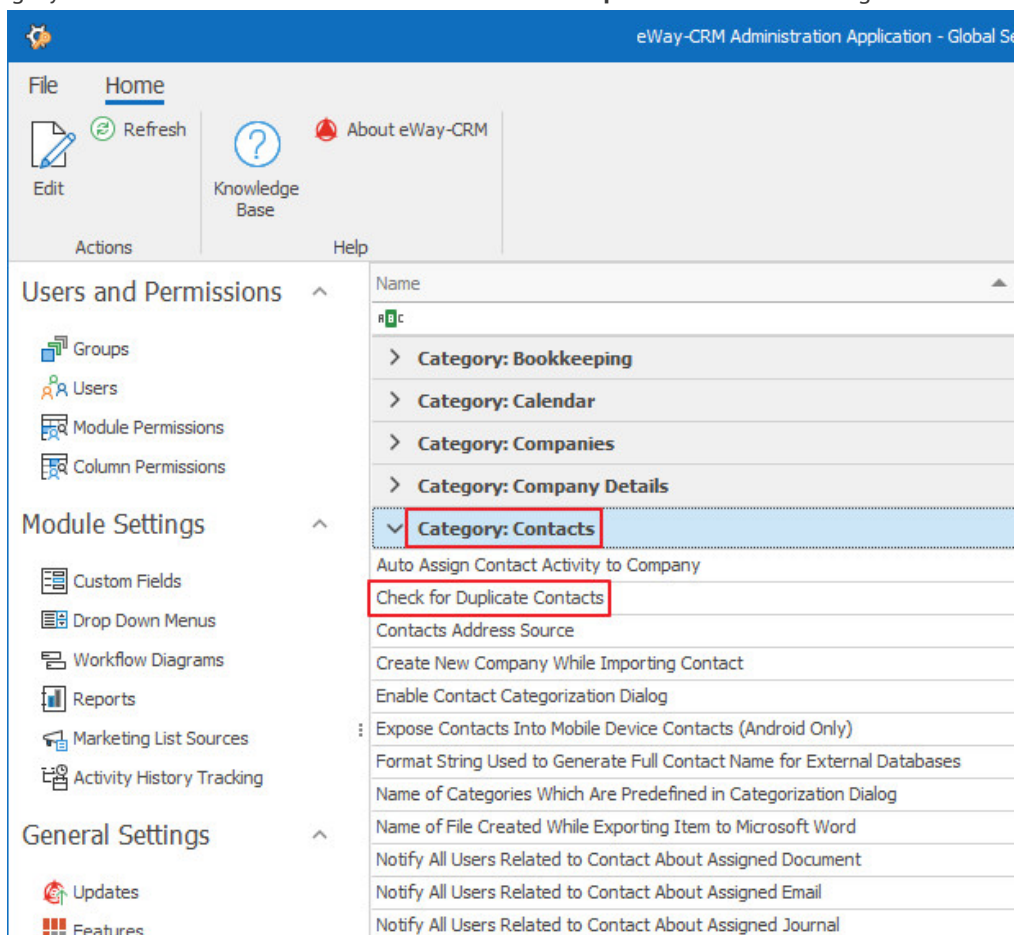




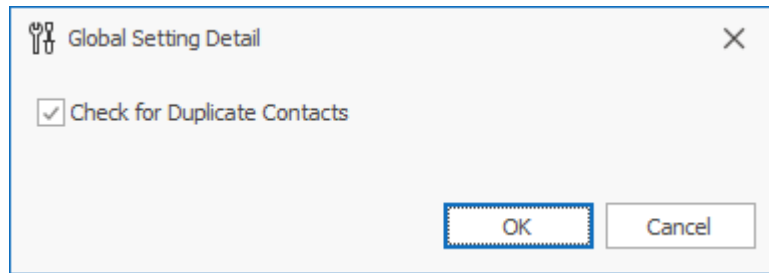
- Then, go to **Global Settings** section.



- Click Category: Contacts and use double-click on **Check for Duplicate Contacts** setting.



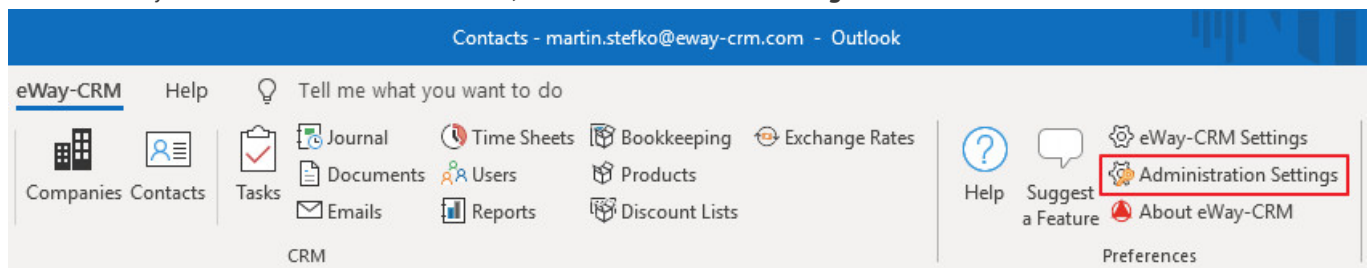
4. You have to mark the check box of the setting, so the duplicate check by email address will be set.



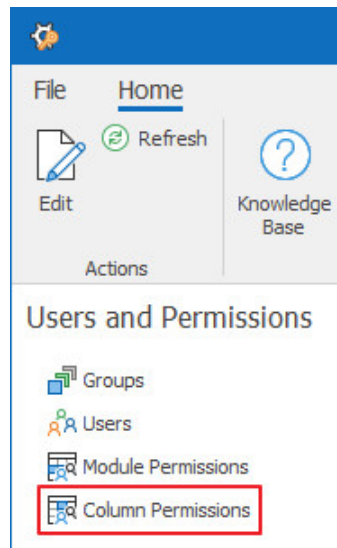
## Unique Value in the Field

Column Permissions module in Administration Settings allows you to set field as unique. No matter you select Mobile, Fill Name or your own custom field. You can set field as unique in this way:

1. In eWay-CRM tab in Microsoft Outlook, click **Administration Settings**.



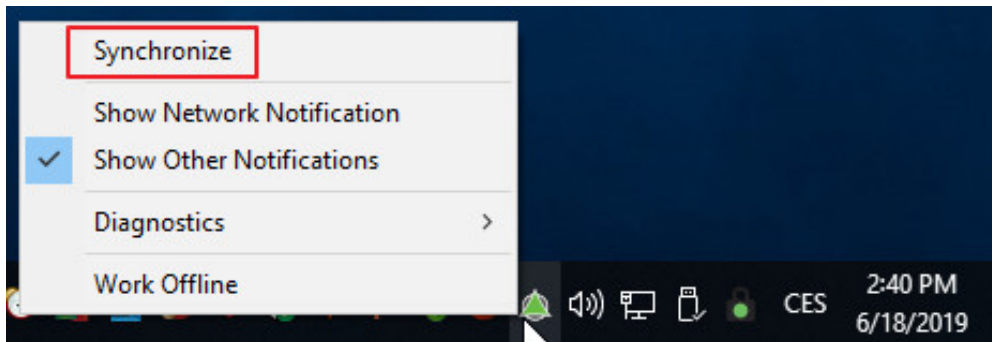
2. Then, go to **Column Permissions**.



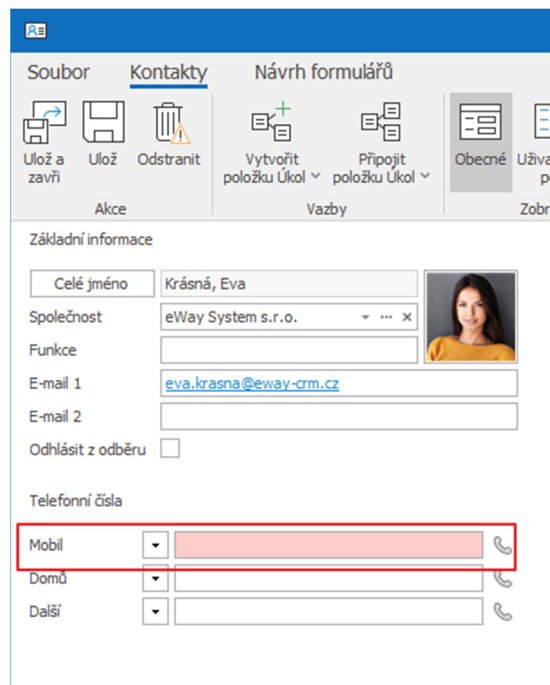
3. Select **System** group and find **Contacts** module where you want to set some field as unique. In the **Mandatory** column, you need to select **Unique** value for this field. You can set the field as Unique only in the case, that there are no duplicate values in database already – empty values are also marked as duplicates.



- Wait for 30 sec for automatic synchronization or synchronize changes manually. To do that, right-click on the eWay-CRM agent in the system tray and select **Synchronize**.



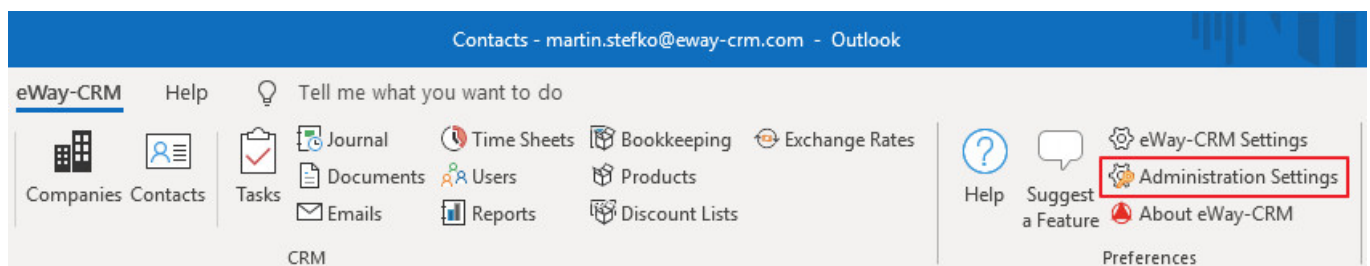
- Now, the field is highlighted by red background when the value is empty or the value in it is same as value on other contact in eWay-CRM.



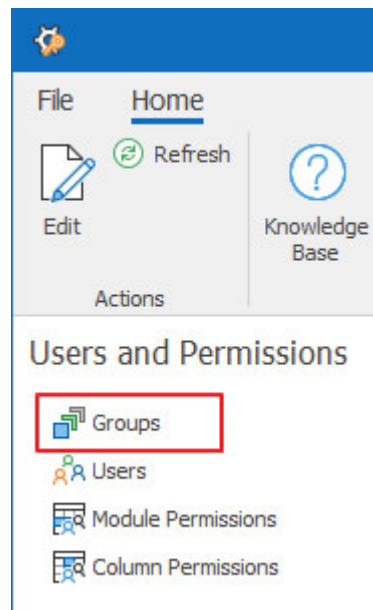
## How to Categorize Contacts

Do you need to group contacts to segment them correctly? No matter you need groups by region, contact type or his or her hobbies. For those and other reasons, eWay-CRM offers you categorization:

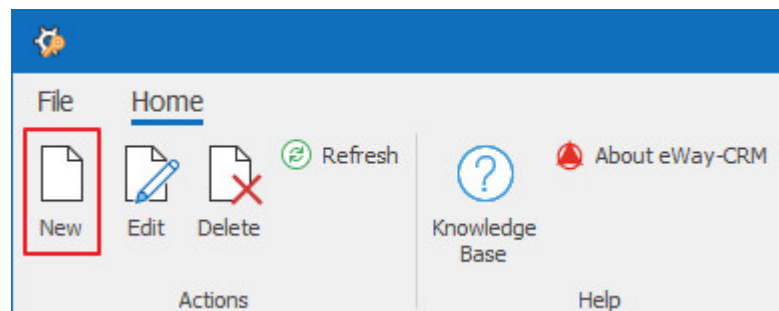
- Click **Administration Settings** on the eWay-CRM ribbon.



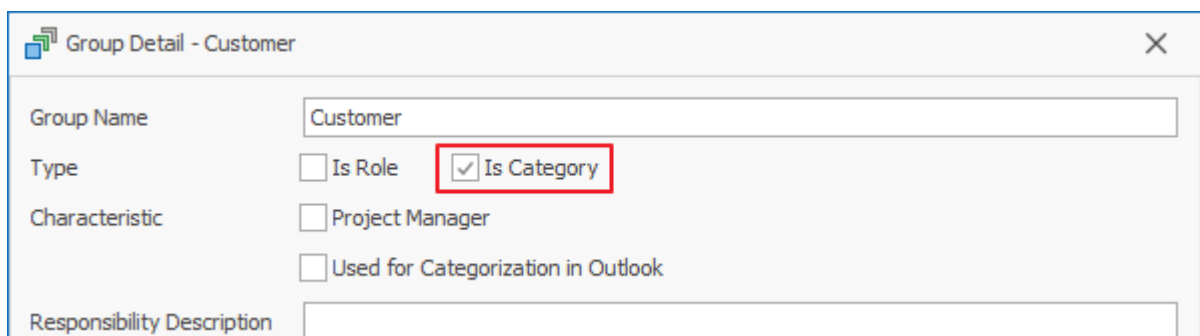
2. Click **Groups** under the **Users and Permissions** tab.



3. Click **New**.



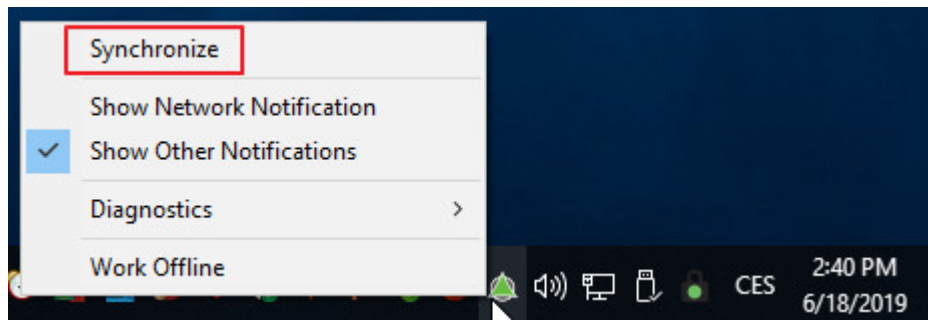
4. Specify a **Group Name**, check **Is Category** box and click **OK**.



The screenshot shows the 'Group Detail - Customer' dialog box. It contains the following fields and options:

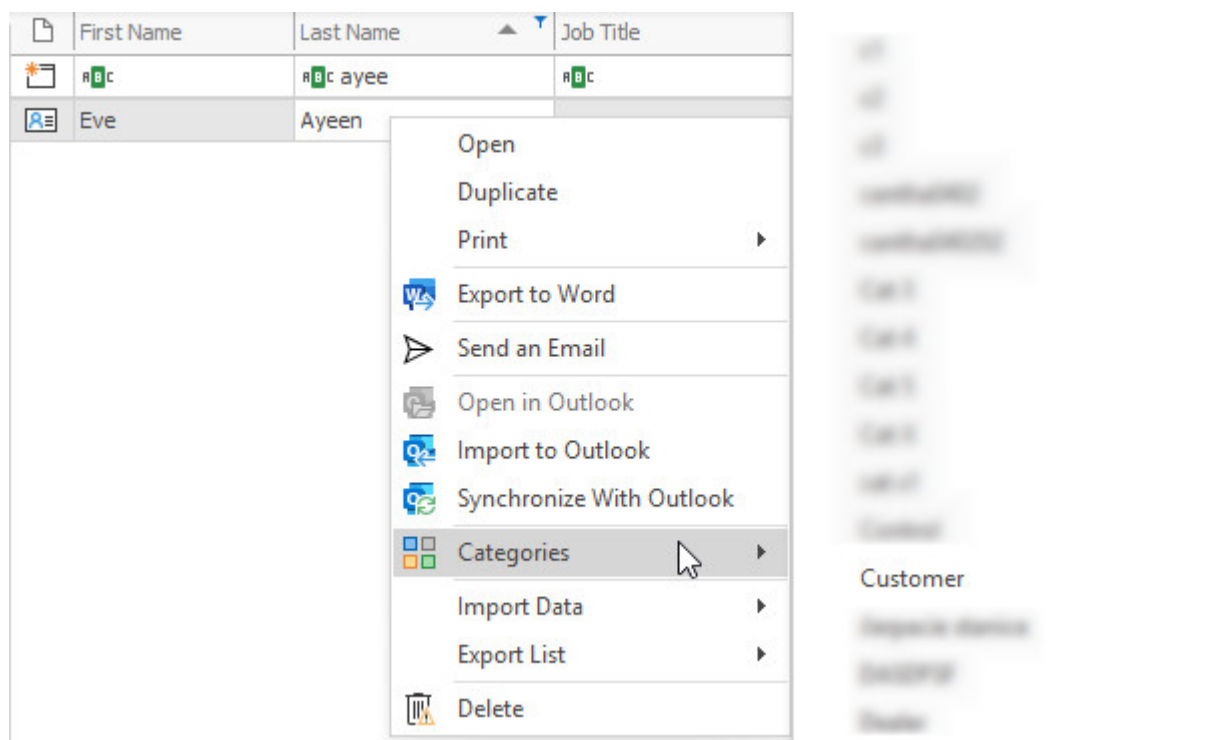
- Group Name:** A text box containing the value 'Customer'.
- Type:** A section with two checkboxes: 'Is Role' (unchecked) and 'Is Category' (checked). The 'Is Category' checkbox is highlighted with a red box.
- Characteristic:** A section with two checkboxes: 'Project Manager' (unchecked) and 'Used for Categorization in Outlook' (unchecked).
- Responsibility Description:** A text box.

- Wait for 30 sec for automatic synchronization or synchronize changes manually. To do that, right-click on the eWay-CRM agent in the system tray and select **Synchronize**.

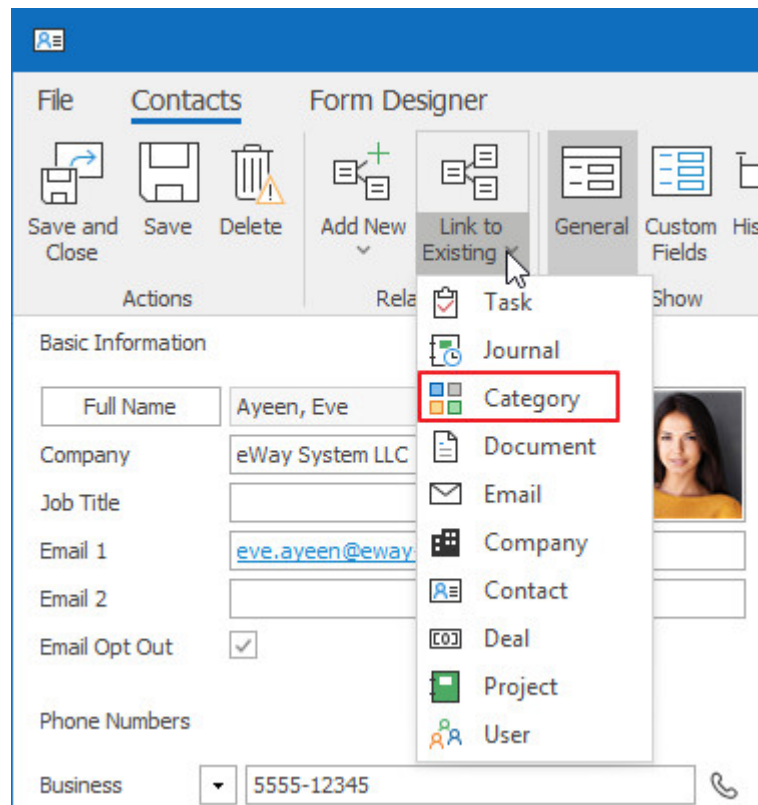


Now you can assign the category to a contact.

- Click on any module to open the list of items.
- Right-click on an item(s) and select **Categories**.



Alternatively, you can open an item, click **Link to Existing** and select **Category**.



Now, you can add a column **Categories** to a list view of contacts. and filter or group items by categories. Learn more about creating custom list views [here](#). See examples below:

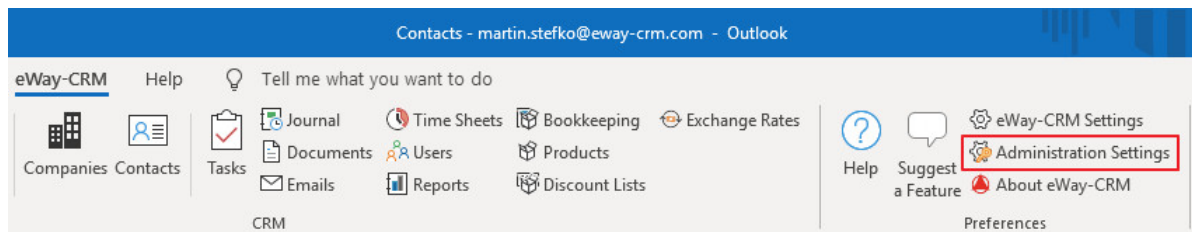
	First Name	Last Name	Categories
	Bob	Abbott	= Customer
	Raewyn	Abbott	Customer
	Eve	Ayeen	Customer
	Besim	Kqiku	Customer
	Andrew	Page	Customer
	Ram	Raghuraman	Customer
	James	Robertson	Customer
	Ian	Walton	Customer
	Kanisha	Waycott	Customer
	Karen	Wong	Customer

Categories	First Name	Last Name
=	Bob	Abbott
▼ Customer		
Customer	Raewyn	Abbott
Customer	Bob	Admans
Customer	Eve	Ayeen
Customer	John	Bellinger

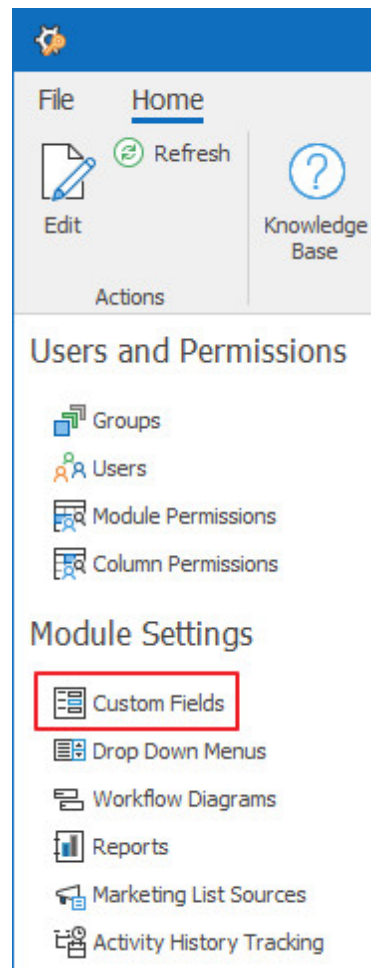
## How to Create Custom Field

eWay-CRM gives you default fields for each item type. But we understand that each company is unique and there is need to create own fields. For this purpose, eWay-CRM allows you to create your own custom fields:

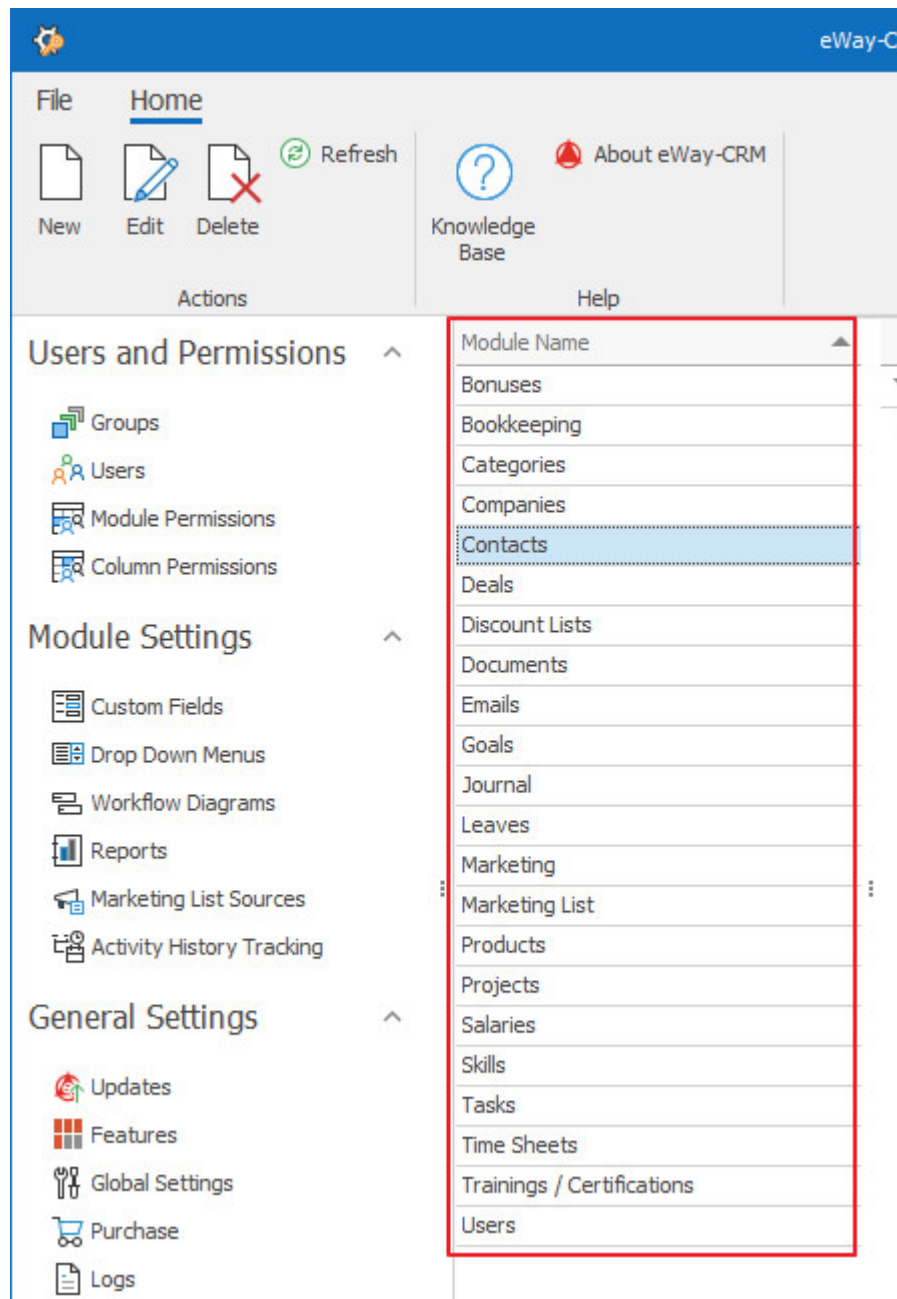
1. Click **Administration Settings** on the eWay-CRM ribbon.



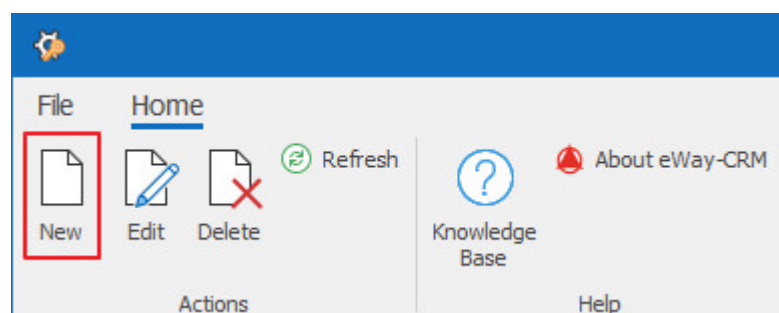
2. Click **Custom fields** under the **Module settings** tab.



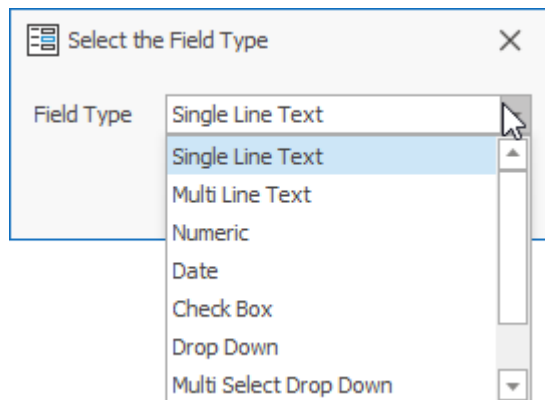
3. Select the module you want to create the field for.



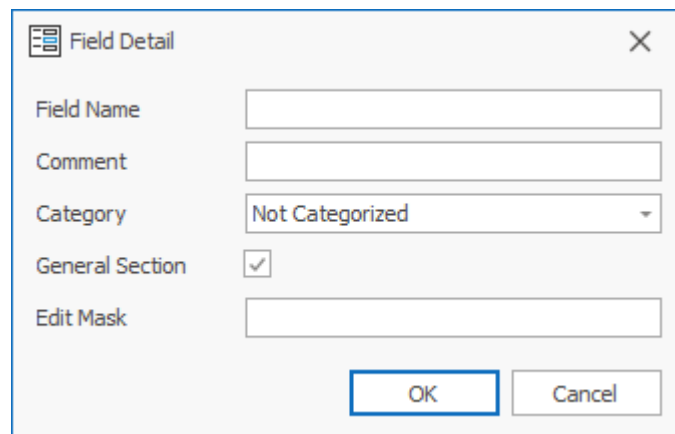
4. Click **New**.



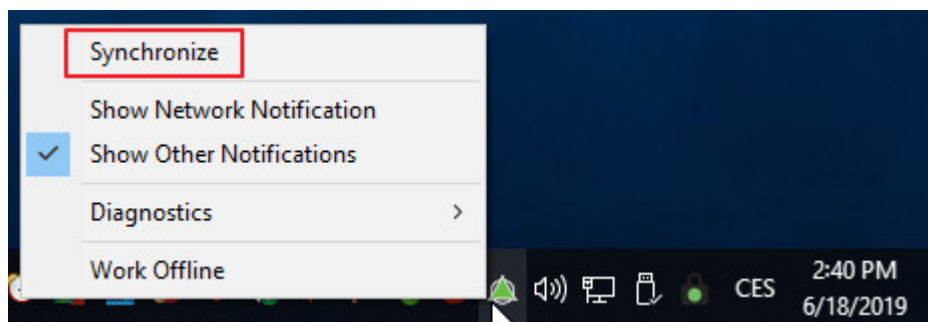
5. Choose the field type. [Learn more about field types.](#)



6. Specify the field name (and, optionally, comment and category). Click **OK**.



7. Wait for 30 sec for automatic synchronization or synchronize changes manually. To do that, right-click on the eWay-CRM agent in the system tray and select **Synchronize**.

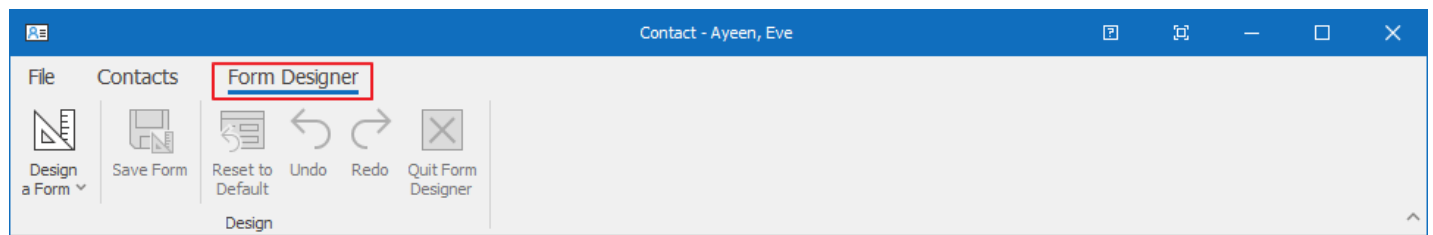


## How to Make Your Own Contact Layout

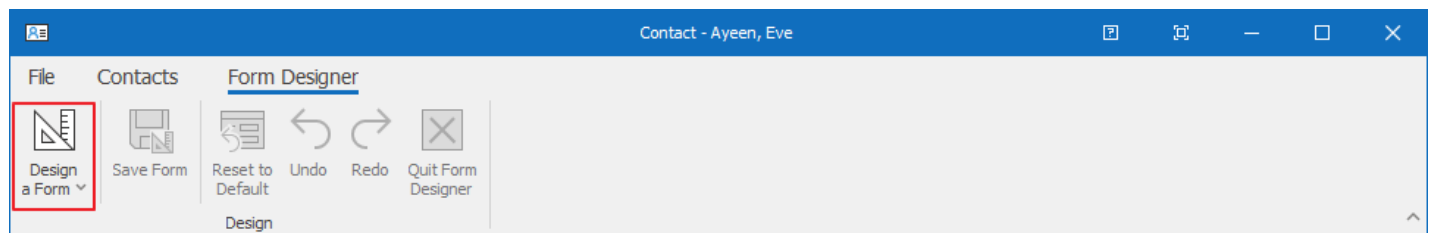
The contact window can be customized to your needs. Let's have a look of how to work with Form Designer.

**Form Designer** allows you to easily edit default layouts so that you can keep only the necessary fields and organize them in the most convenient way. Your forms are visible to all users, but they can be customized only by users with administration permissions.

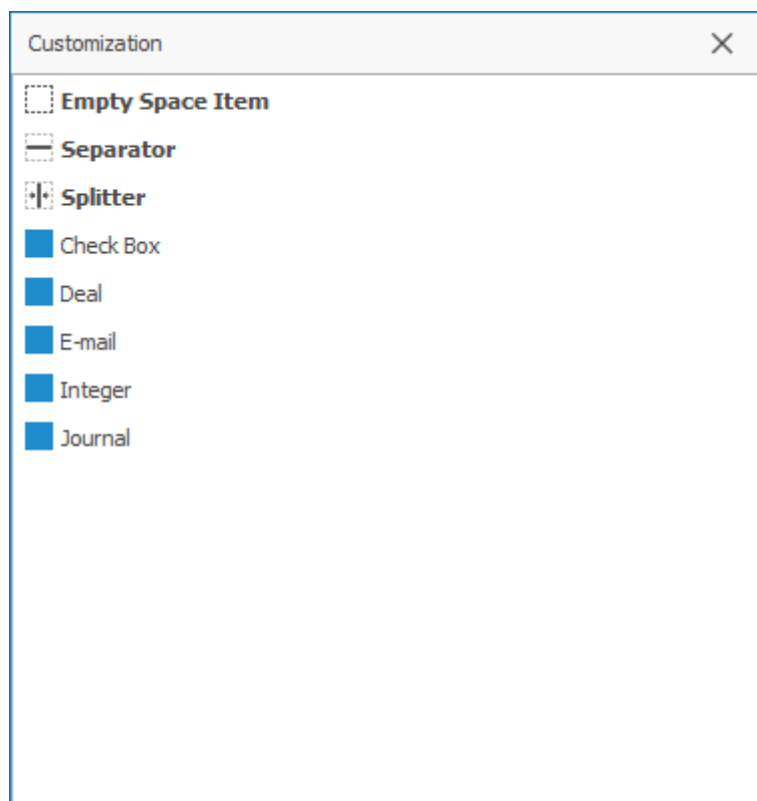
1. Open a Contacts card where you want to customize the layout.
2. Click **Form Designer** in the upper part of the window.



1. Click the icon **Design a Form**.

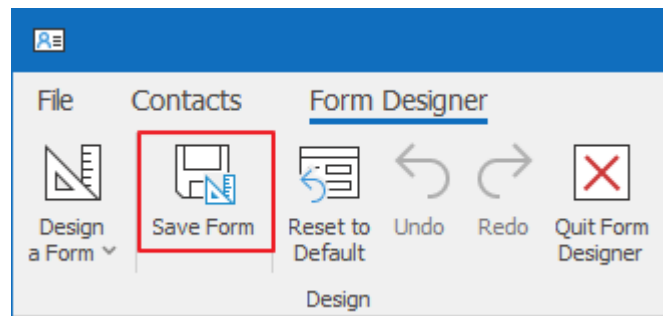


2. The **Customization Panel** will appear. You can drag-and-drop its elements to create your custom layout.

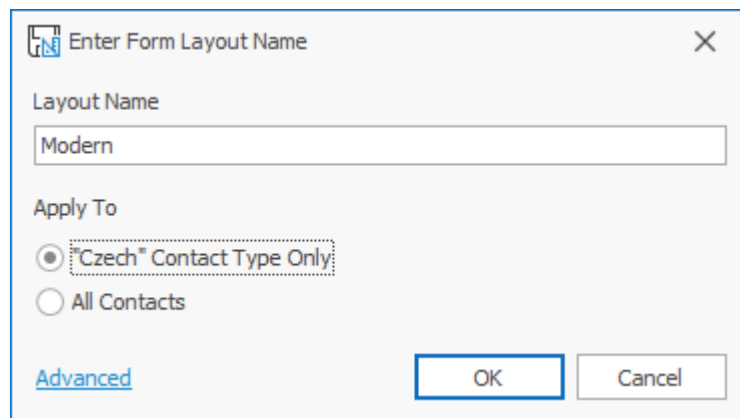




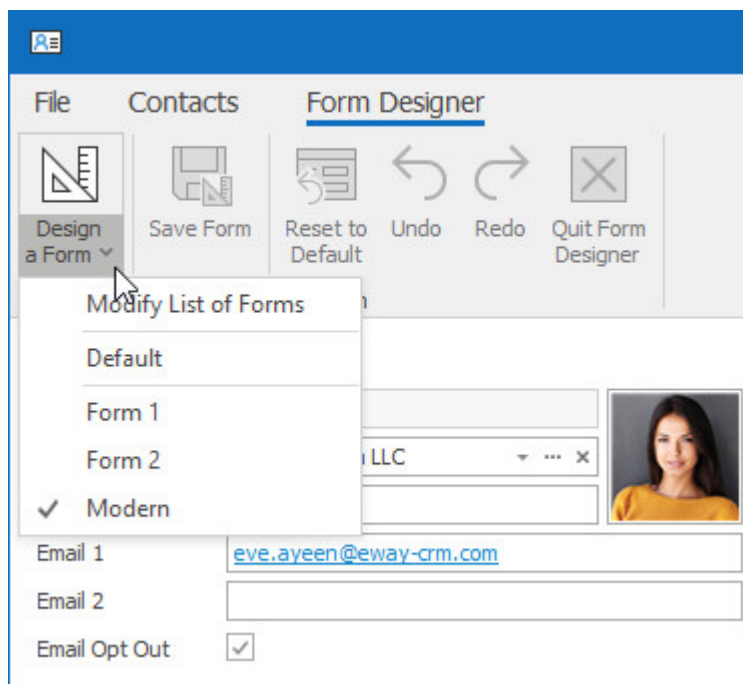
3. To apply changes, click **Save** and **Quit Form Designer**.



4. During saving the form, you can select, whether you want to apply new form only for current type, or for all contact types. As special option, you can click **Advanced** and choose only some types for what the form will be set.



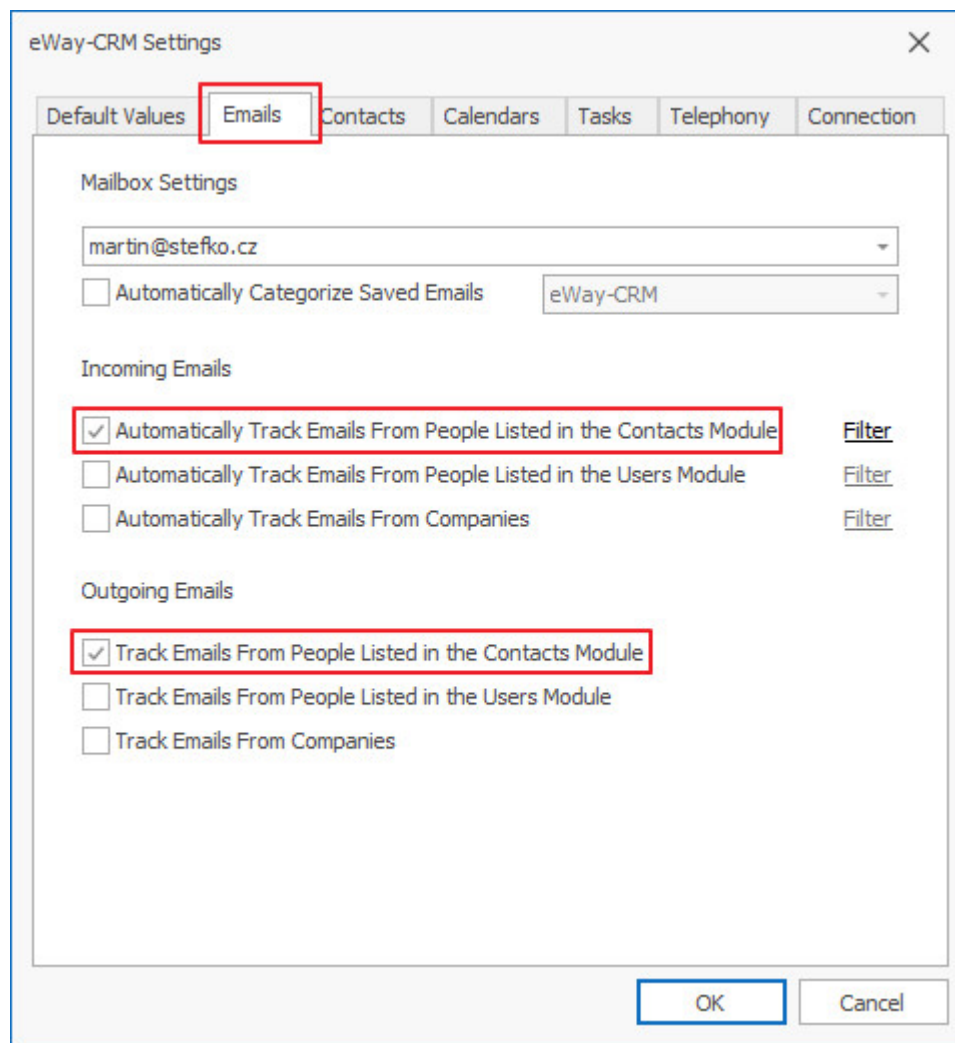
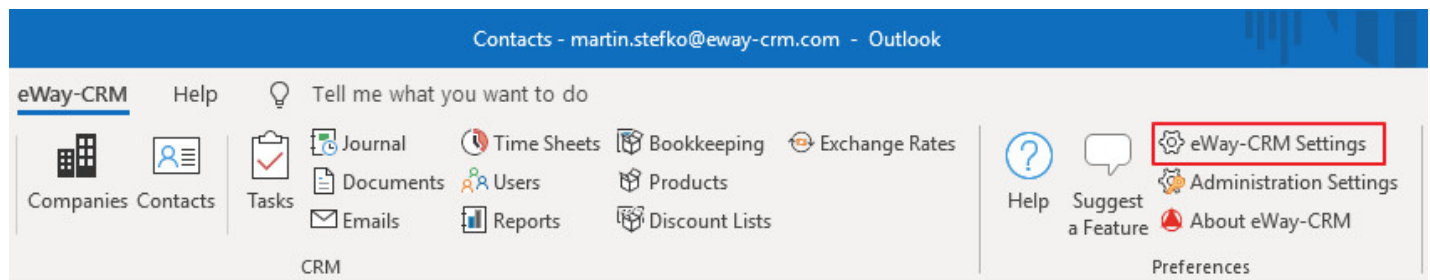
5. It is possible to save multiple layouts under different names. To see the list of saved layouts, click **Design a Form**.



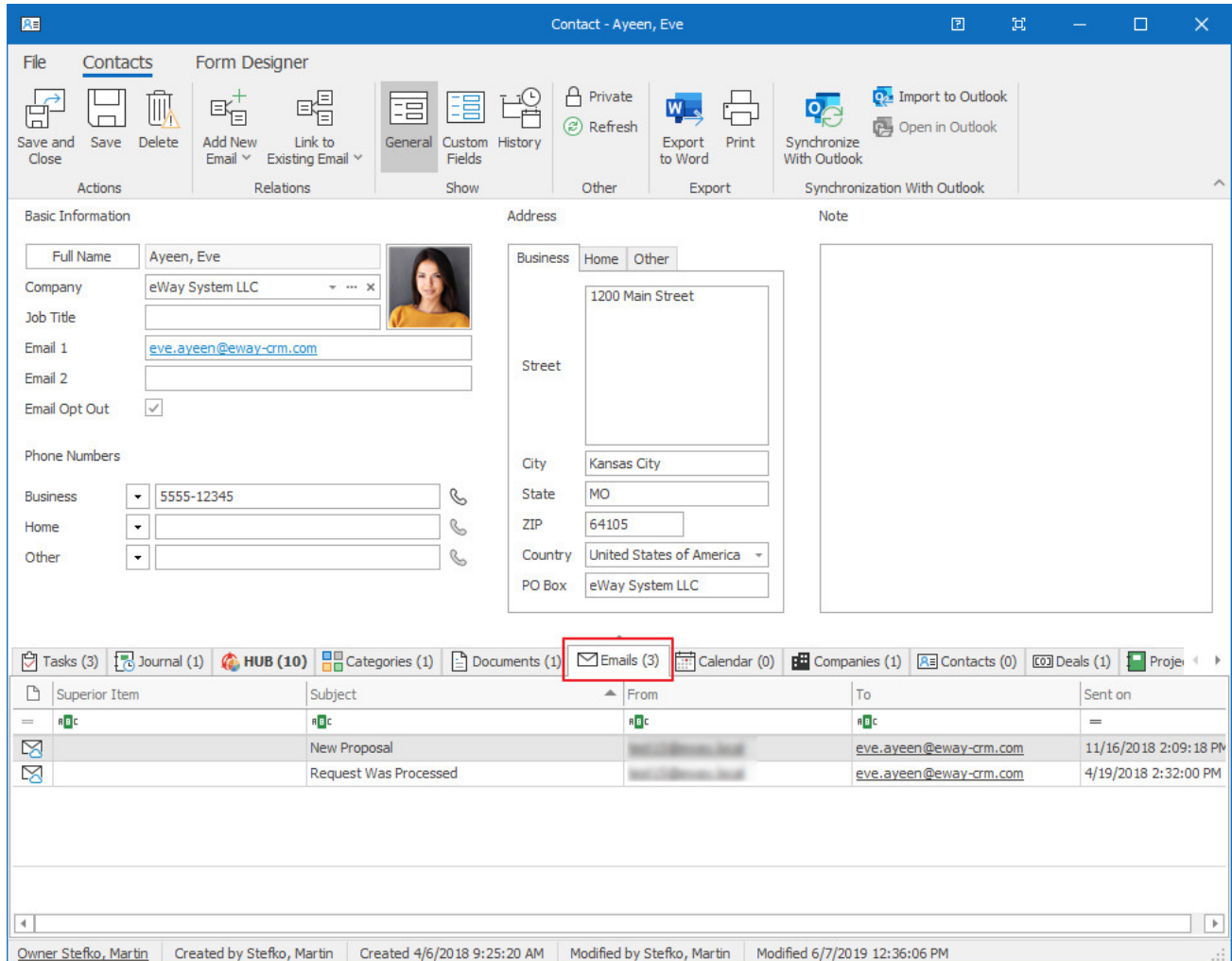
## How to Set Automatic Saving of Emails

Incoming and outgoing emails can be saved manually to eWay-CRM, but you can set automatic saving. Just follow these steps:

You can specify conditions for saving emails to contacts automatically in **eWay-CRM Settings > Emails**.



Now, when you click **Send** in your Outlook, eWay-CRM will look for the contact in the database. If there is such a contact, eWay-CRM will link the email to it. All emails can be found under the **Emails** tab on the contact card.



**Contact - Ayeen, Eve**

**Basic Information**

Full Name: Ayeen, Eve  
 Company: eWay System LLC  
 Job Title:  
 Email 1: eve.ayeen@eway-crm.com  
 Email 2:  
 Email Opt Out: ☒  
 Phone Numbers:  
 Business: 5555-12345  
 Home:  
 Other:

**Address**

Business Home Other  
 1200 Main Street  
 Street  
 City: Kansas City  
 State: MO  
 ZIP: 64105  
 Country: United States of America  
 PO Box: eWay System LLC

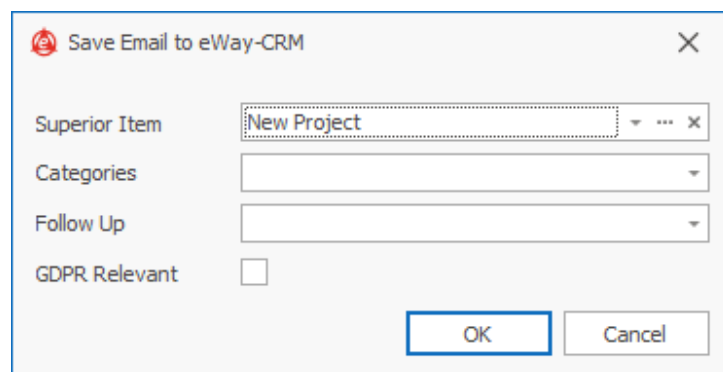
**Note**

**Emails (3)**

Superior Item	Subject	From	To	Sent on
New Proposal		eve.ayeen@eway-crm.com	eve.ayeen@eway-crm.com	11/16/2018 2:09:18 PM
Request Was Processed		eve.ayeen@eway-crm.com	eve.ayeen@eway-crm.com	4/19/2018 2:32:00 PM




Owner: Stefko, Martin  
 Created by: Stefko, Martin  
 Created: 4/6/2018 9:25:20 AM  
 Modified by: Stefko, Martin  
 Modified: 6/7/2019 12:36:06 PM

When you send emails, you can also link them to a **Superior Item**, i.e. a deal or a project where this person is specified as a contact.



**Save Email to eWay-CRM**

Superior Item: New Project  
 Categories:  
 Follow Up:  
 GDPR Relevant: ☐  
 OK Cancel

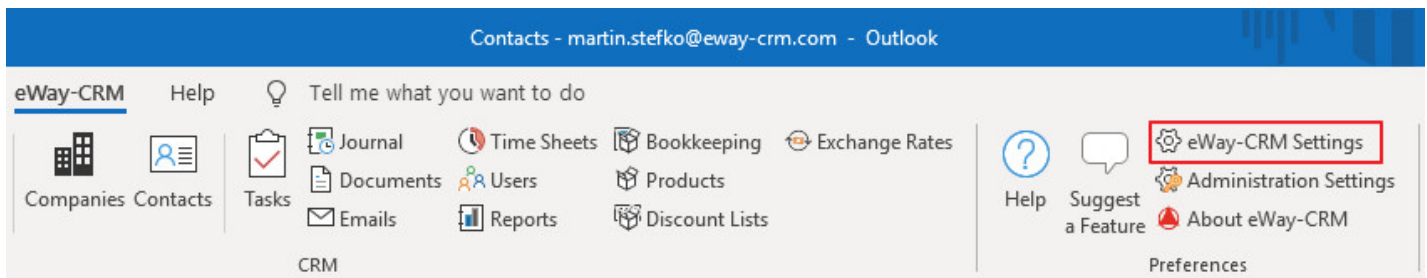
You can click on  to open the deal/project in a separate window, you can click on  to search a deal/project, or you can click on  to clear the field.

Click **OK** to save the email to eWay-CRM or click **Cancel** if you don't want to save it.

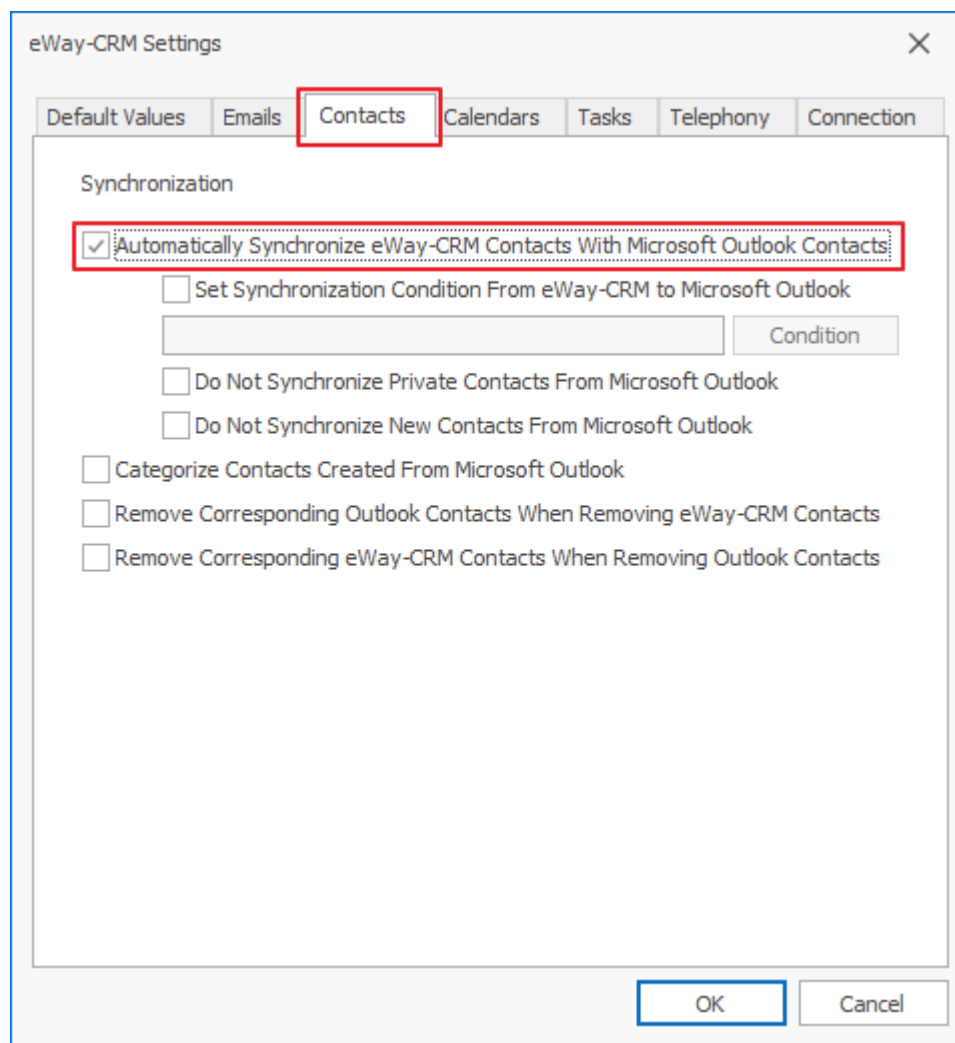
## How to Synchronize Contacts to Microsoft Outlook

eWay-CRM allows you to automatically synchronize contacts when you can set whether synchronize all contacts between eWay-CRM and Microsoft Outlook, or you set filter that allows only synchronization of specific contacts. Please, follow these steps:

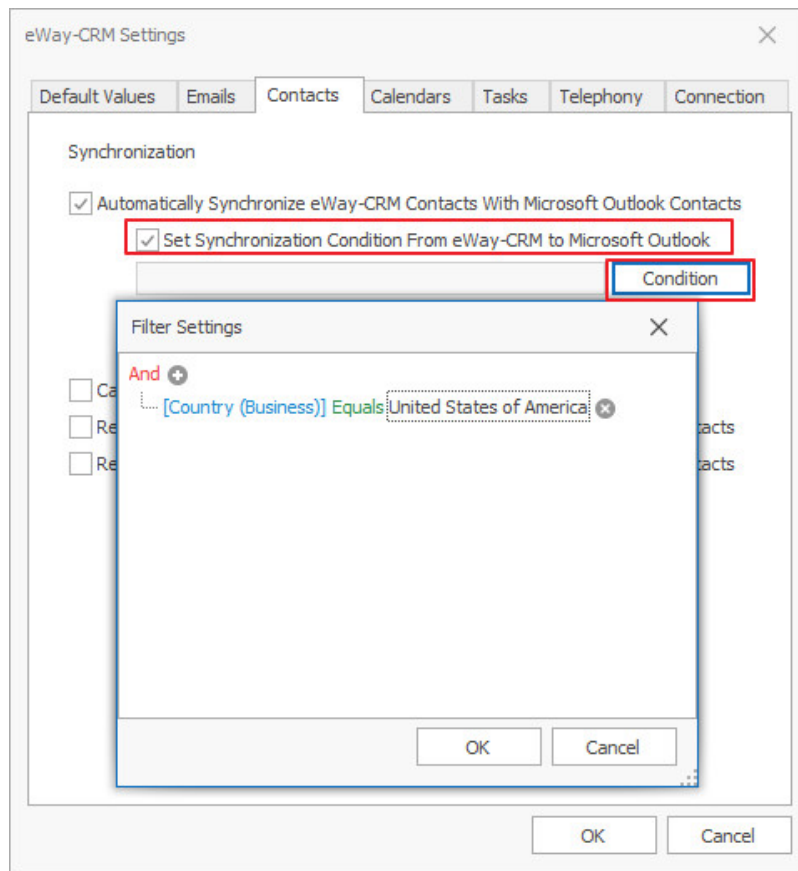
1. In the eWay-CRM ribbon, go to **eWay-CRM Settings**.



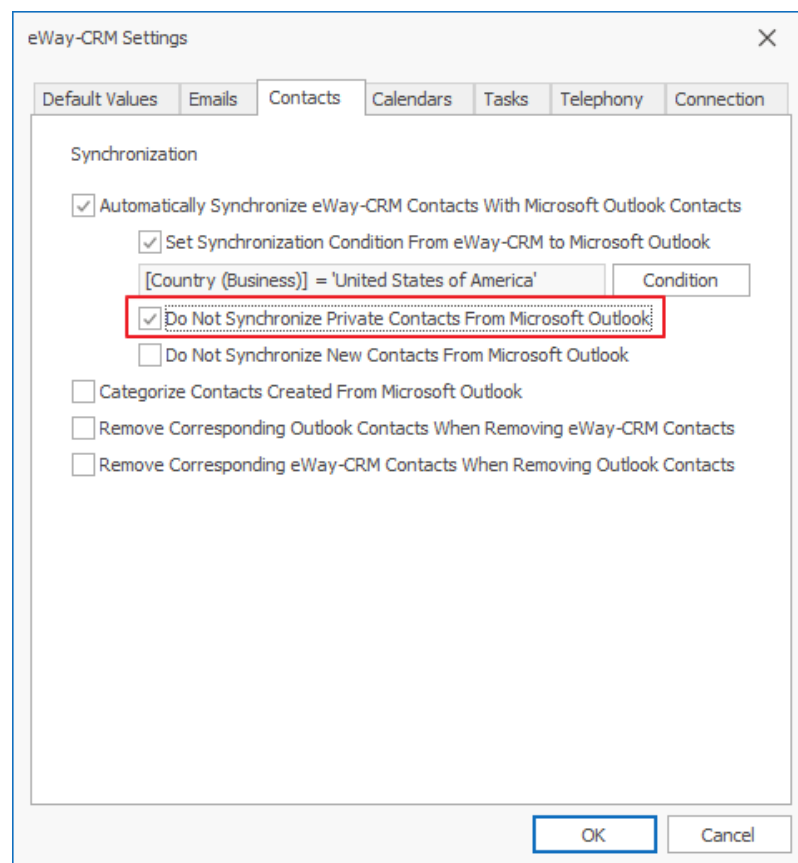
2. Select **Contacts** and mark the check box **Automatically Synchronize eWay-CRM Contacts With Microsoft Outlook Contacts**.



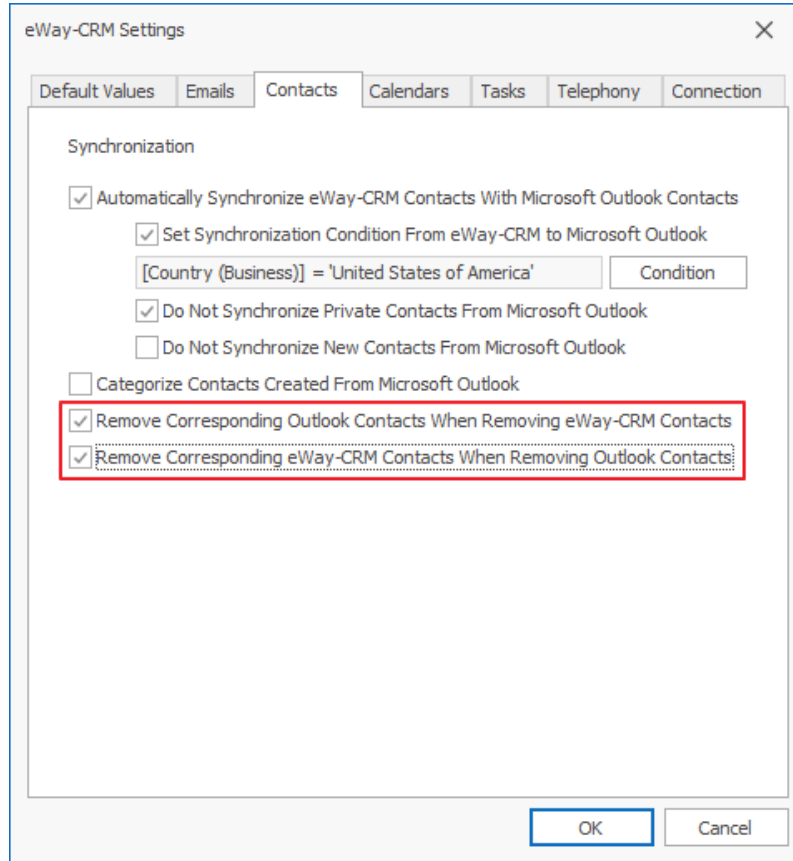
1. If you want to synchronize only a specific group of contacts, you can check the box **Set synchronization condition from eWay-CRM to Microsoft Outlook** and apply a filter (see an example below).



2. Optionally, you can exclude your private contacts in Outlook from synchronization (**Do Not Synchronize Private Contacts From Microsoft Outlook**).



3. By default, if you delete a contact from eWay-CRM it won't be deleted from Outlook automatically and vice versa. To change the settings, check **Remove Corresponding Outlook Contacts When Removing eWay-CRM Contacts** and **Remove Corresponding eWay-CRM Contacts When Removing Outlook Contacts**.



eWay-CRM Settings

Default Values | Emails | **Contacts** | Calendars | Tasks | Telephony | Connection

Synchronization

☒ Automatically Synchronize eWay-CRM Contacts With Microsoft Outlook Contacts

☒ Set Synchronization Condition From eWay-CRM to Microsoft Outlook

[Country (Business)] = 'United States of America' Condition

☒ Do Not Synchronize Private Contacts From Microsoft Outlook

☐ Do Not Synchronize New Contacts From Microsoft Outlook

☐ Categorize Contacts Created From Microsoft Outlook

☒ Remove Corresponding Outlook Contacts When Removing eWay-CRM Contacts

☒ Remove Corresponding eWay-CRM Contacts When Removing Outlook Contacts

OK Cancel

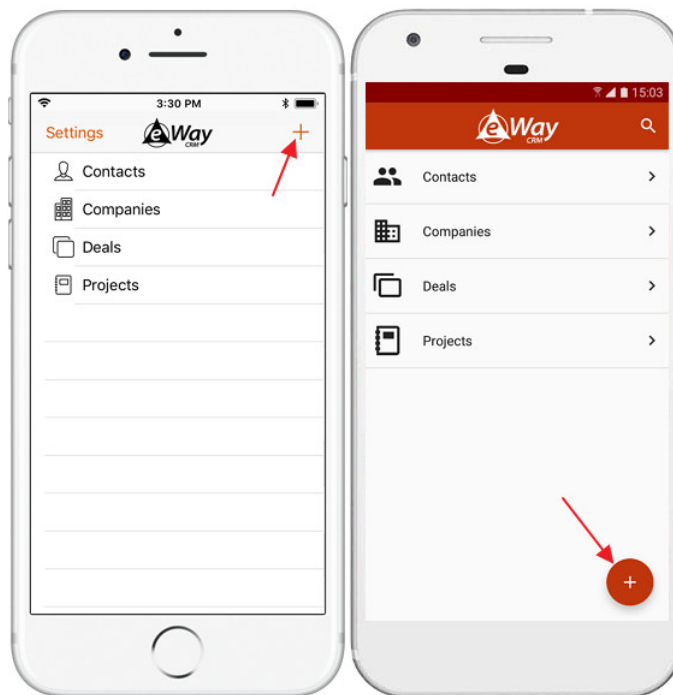
4. Click **OK** and restart Outlook. As soon as Outlook starts again, it will import all your eWay-CRM contacts into Outlook and vice versa.

## Manuals for eWay-CRM® Mobile

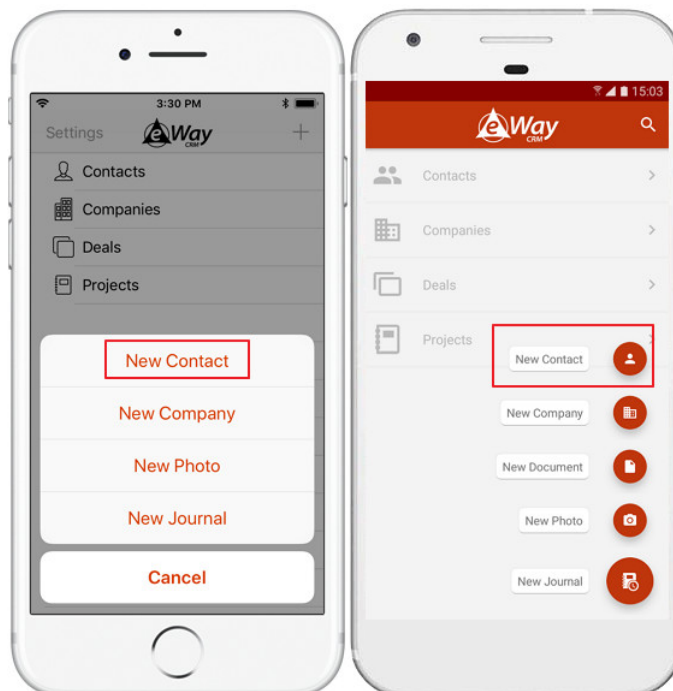
### How to Create Contact

Contacts can be easily created when you have business meeting with new client. You create new contacts in seconds and put it in eWay-CRM. You have two ways how to create a new company:

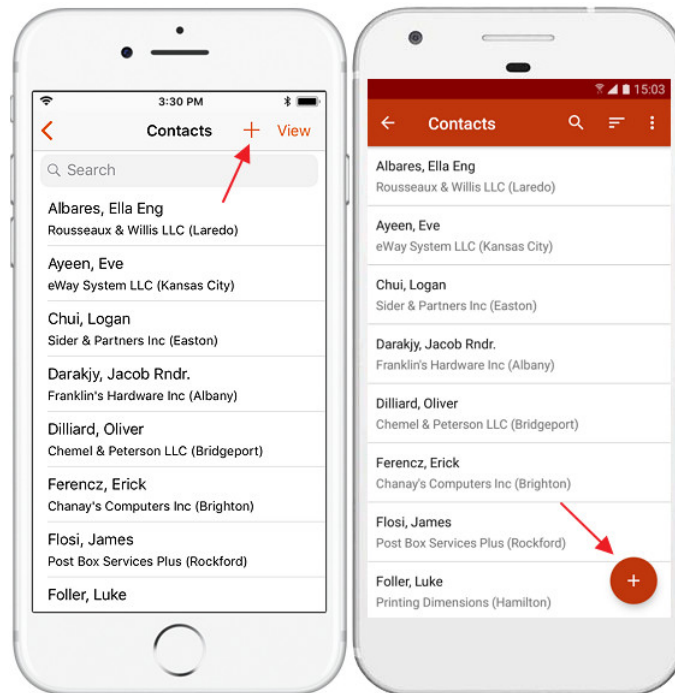
1. In the main menu, tap on the + sign.



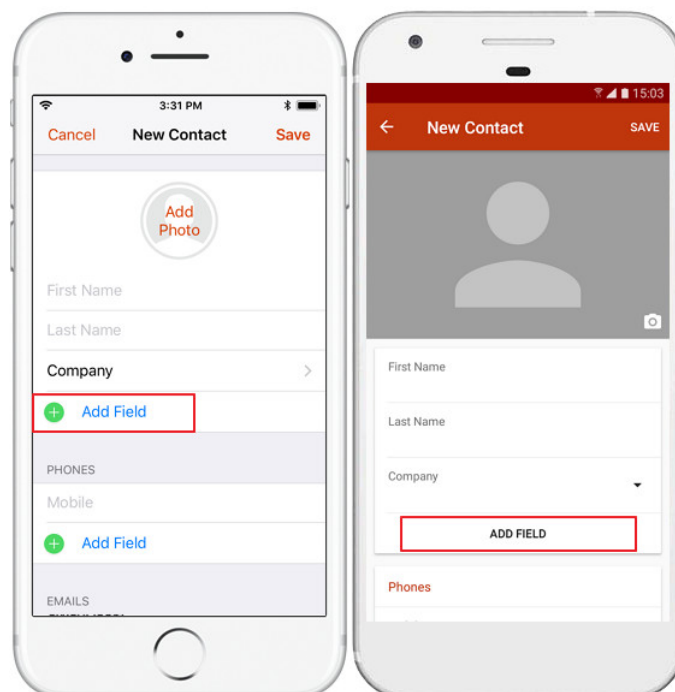
Then, select **New Contact**.



2. If you are in the contacts list, you can tap on the + sign right away.

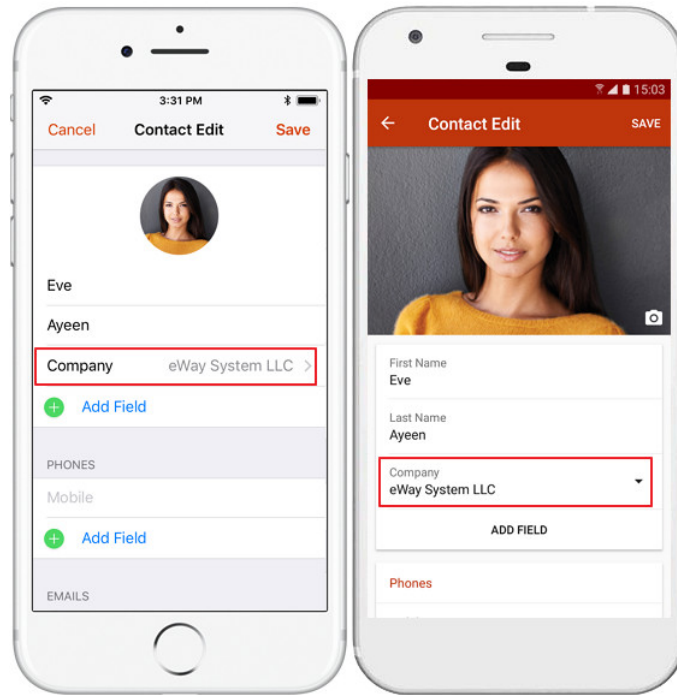


In both cases, the window for creating new contact will be opened. You can see default fields, but you can add other fields by tapping **Add Field** option.

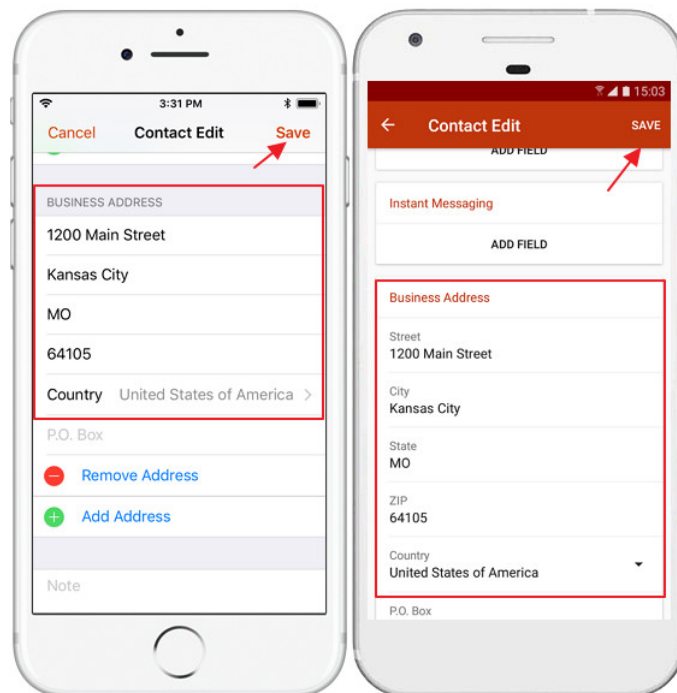


Fill in name and surname and add photo of the person. Then, you can select company that contact is working for (company can be add from the list or as text):

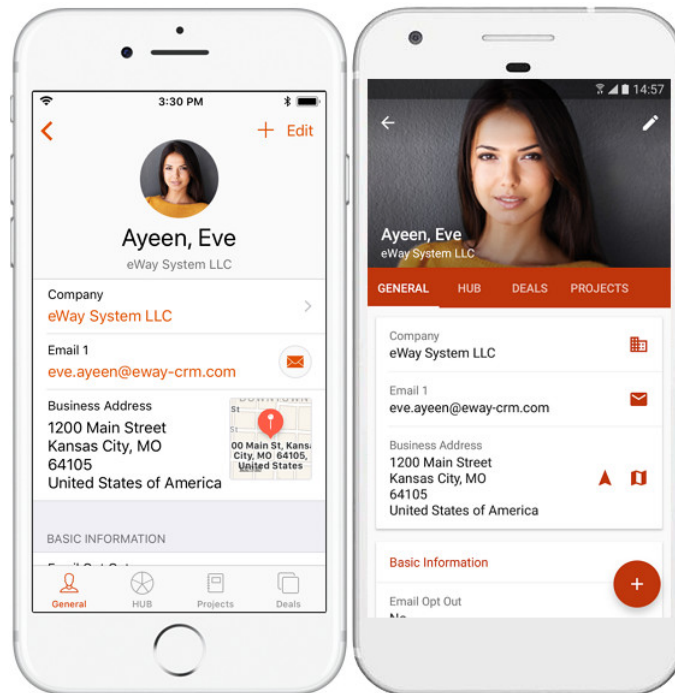




Contact address will be automatically filled from the selected company. Then, you can select all other values you need, and tap **Save** in the right top corner.



The contact will be saved, and you will see its detail, so you can check values or work with data like phone numbers, addresses, etc.



## How to Set Automatic Calles Identification

eWay-CRM Mobile allows you to identify caller even though this caller is not on your phone contacts, but it is saved in your eWay-CRM Mobile contacts. You will always know what business partner is calling you. The setting is different for Android phone and iOS phones.

### For Android Phones

At first, you need to be sure that you are met all requirements that are related to sharing of contacts between eWay-CRM Mobile and other applications. These requirements are:

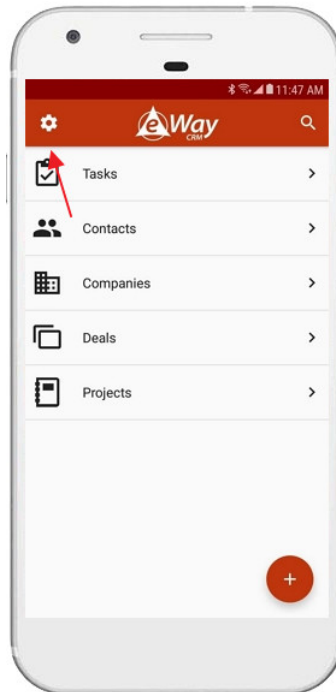
- User has [permissions to export](#) modules and to [view them](#) in eWay-CRM.
- Global settings related to contacts sharing are correctly turned on.
- You permit that eWay-CRM Mobile can have access to contacts on your smart phone.

Global settings are:

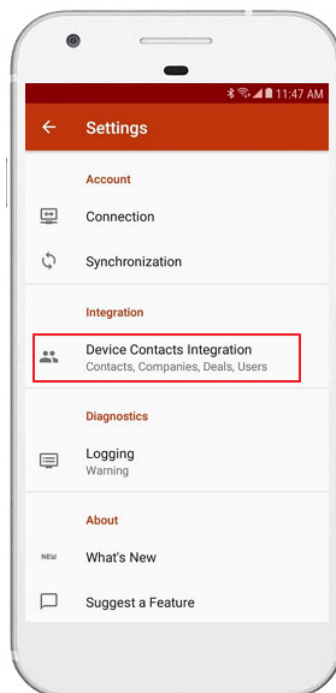
- [Expose Contacts Into Mobile Device Contacts \(Android Only\)](#)
- [Expose Companies Into Mobile Device Contacts \(Android Only\)](#)
- [Expose Deals Into Mobile Device Contacts \(Android Only\)](#)
- [Expose Users Into Mobile Device Contacts \(Android Only\)](#)

If all conditions are fulfilled, you can walk through these steps:

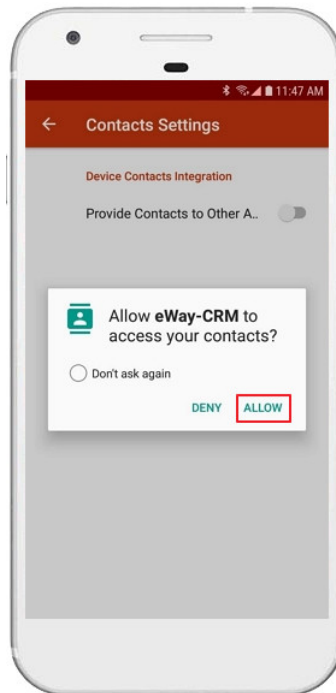
1. Go to eWay-CRM Mobile settings.



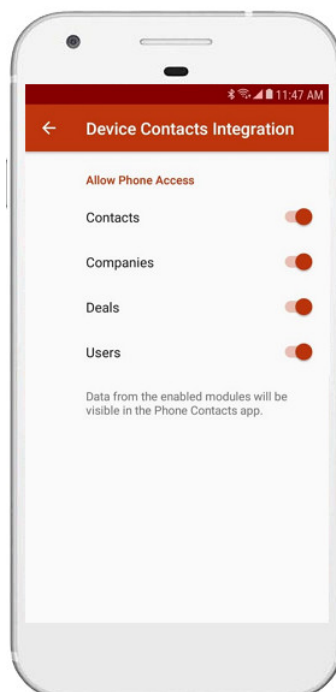
2. Select **Device Contacts Integration**.



3. You will be asked whether you want to give eWay-CRM Mobile access to contacts in your phone. For correct sharing of contacts, this access has to be allowed.



4. Turn on the **Contacts** switch.



5. You will be immediately informed that sharing of contacts starts. You can see the progress in the notification area.

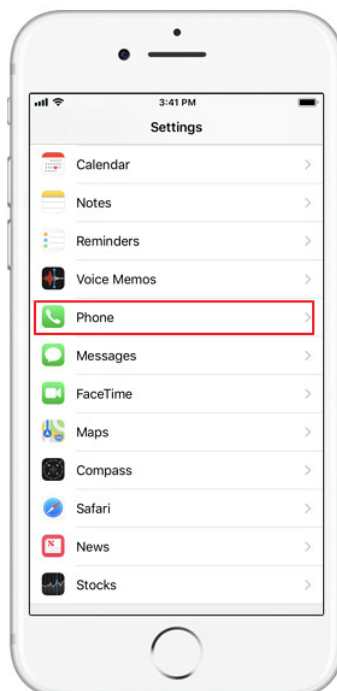
## For iOS Phones

This function needs access to call identifications on your iPhone. Please, follow these steps to allow eWay-CRM caller identification:

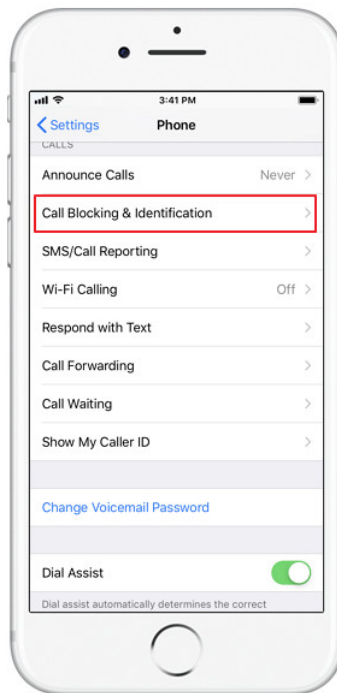
1. Go to iPhone **Settings**.



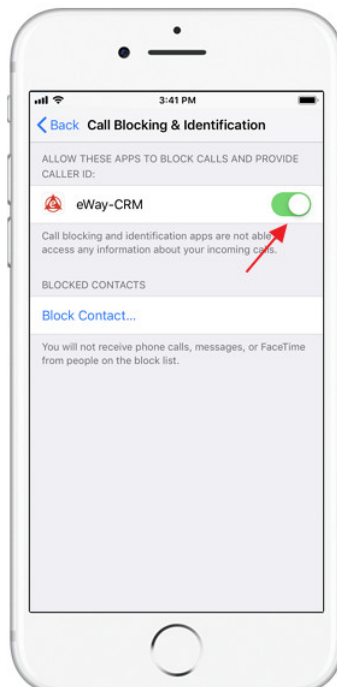
2. Select **Phone** section.



3. Tap **Call Blocking & Identification**.



4. Button next to eWay-CRM must be turned on as you see in the picture.

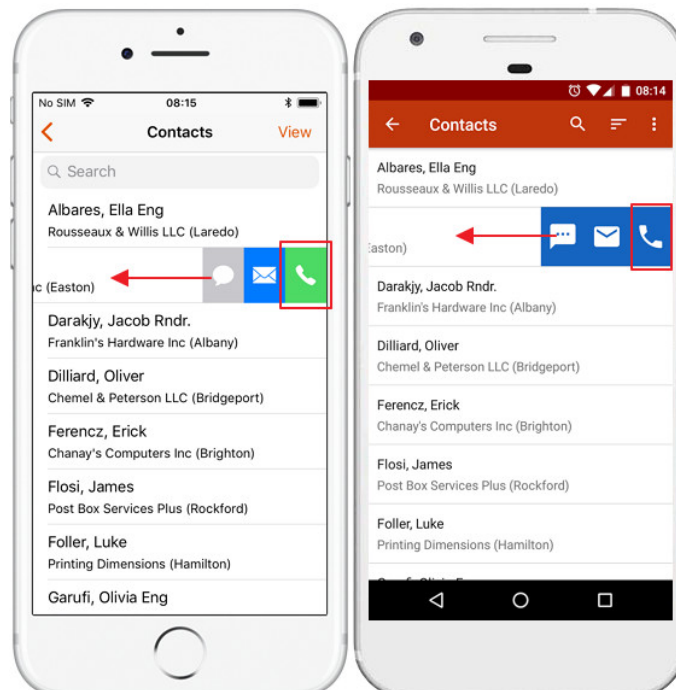


5. Now, if some caller is saved in your eWay-CRM and not in your phone, you still recognize who is calling you.



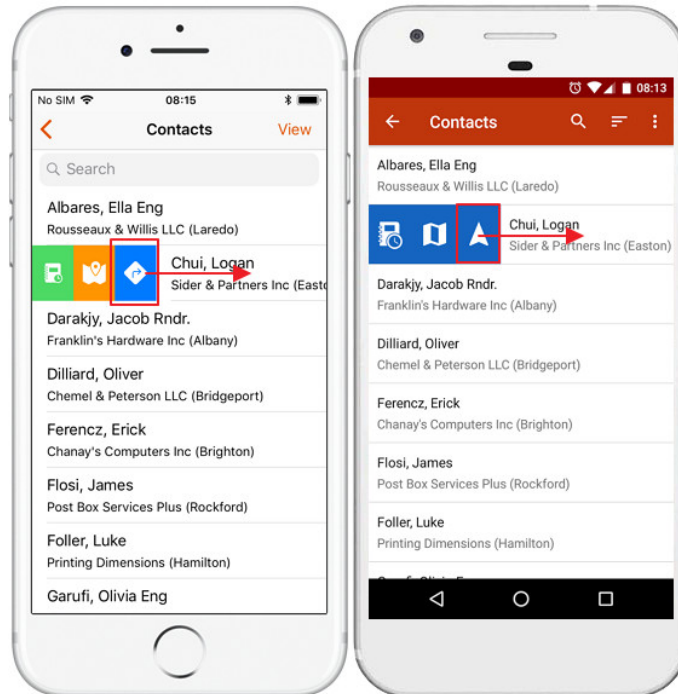
## Quick Calls

If you swipe contact in the contact list to the left, you will see option to call contact immediately.



## Navigate

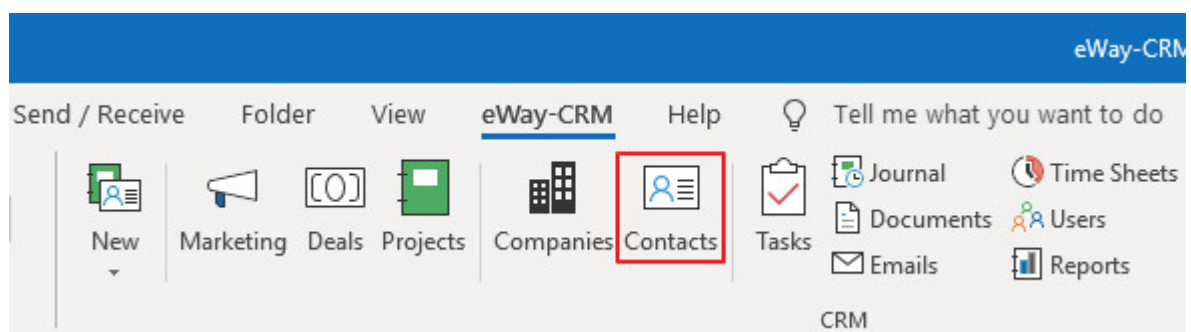
If you swipe contact to the right, you will see option to navigate to contact's address.



## Other Features

### How to Send Bulk Emails

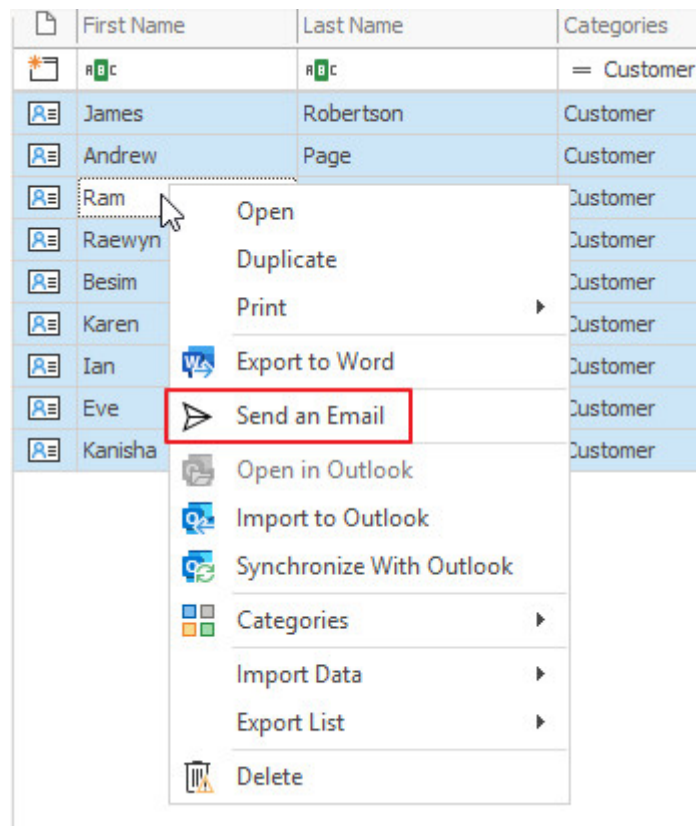
1. Click **Contacts** on the eWay-CRM ribbon.



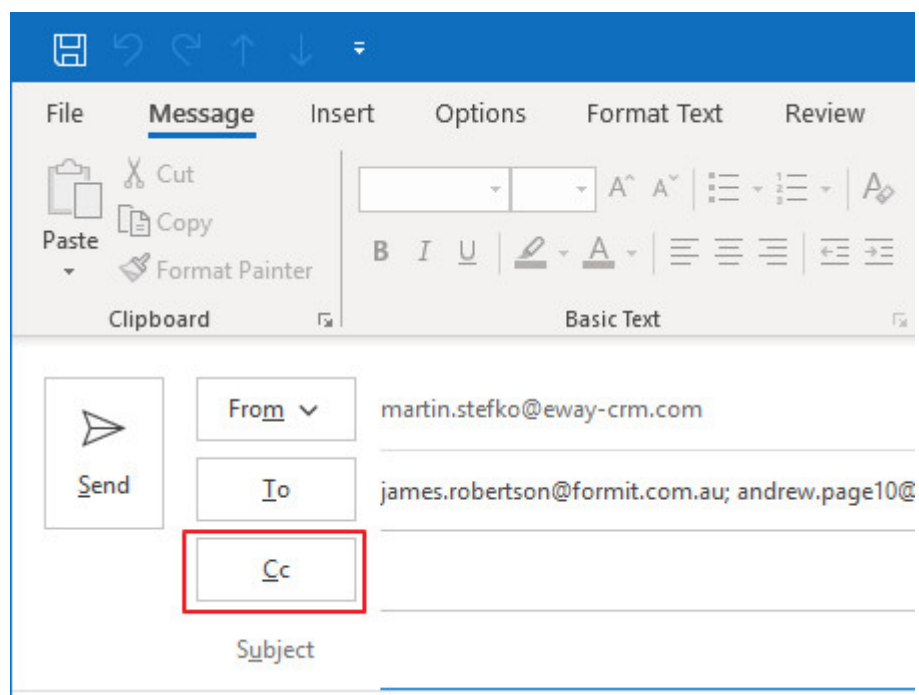
2. Find required contact by filtering and/or grouping records. Learn more in [User views](#).



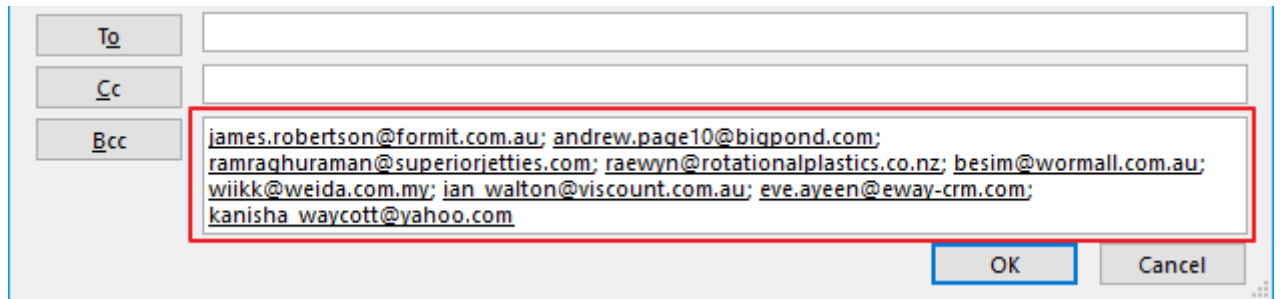
3. Right-click on selected items and select **Send an Email**.



4. The new Email window will open and the **To** field will be automatically pre-filled with the email addresses of all selected contacts.
5. If you do not want to show all email addresses to individual contacts:
  1. Click the **Cc** field, right under the **To** field in the Email window.



2. In the opened dialog box, move all email addresses from **To** to **Bcc**.



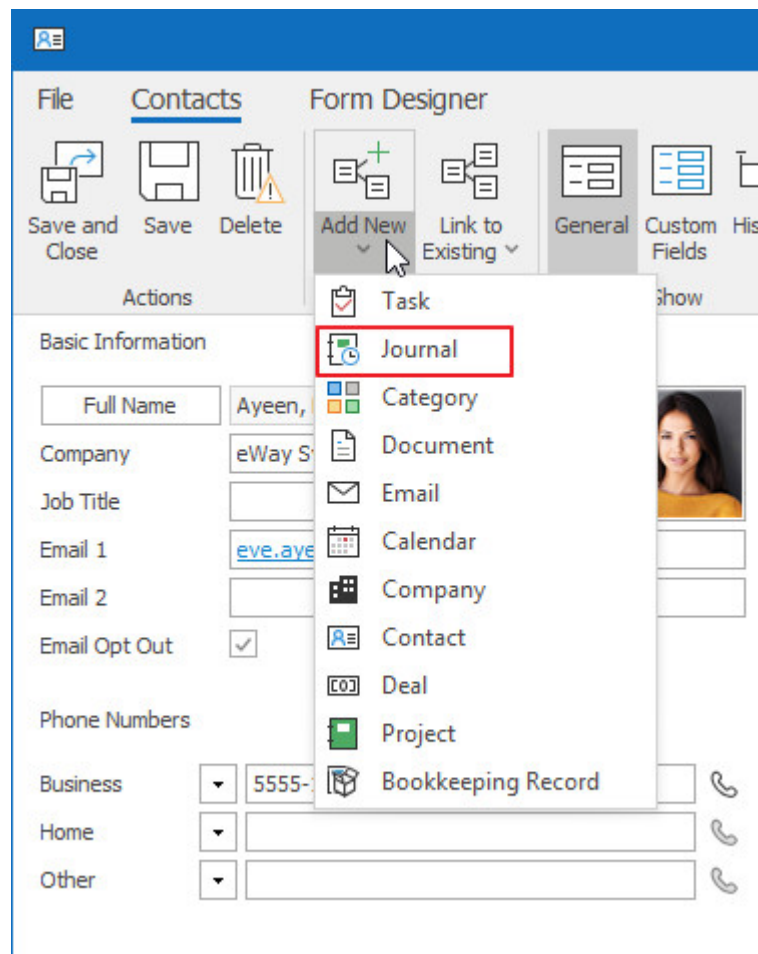
The screenshot shows an email client dialog box with three fields: To, Cc, and Bcc. The Bcc field is highlighted with a red rectangle and contains the following email addresses: james.robertson@formit.com.au; andrew.page10@bigpond.com; ramraghuraman@superiorjetties.com; raewyn@rotationalplastics.co.nz; besim@wormall.com.au; wiikk@weida.com.my; ian walton@viscount.com.au; eve.ayeen@eway-crm.com; kanisha\_waycott@yahoo.com. The OK and Cancel buttons are visible at the bottom right.

3. Click **OK**.

## How to Add Meeting Notes to Contact

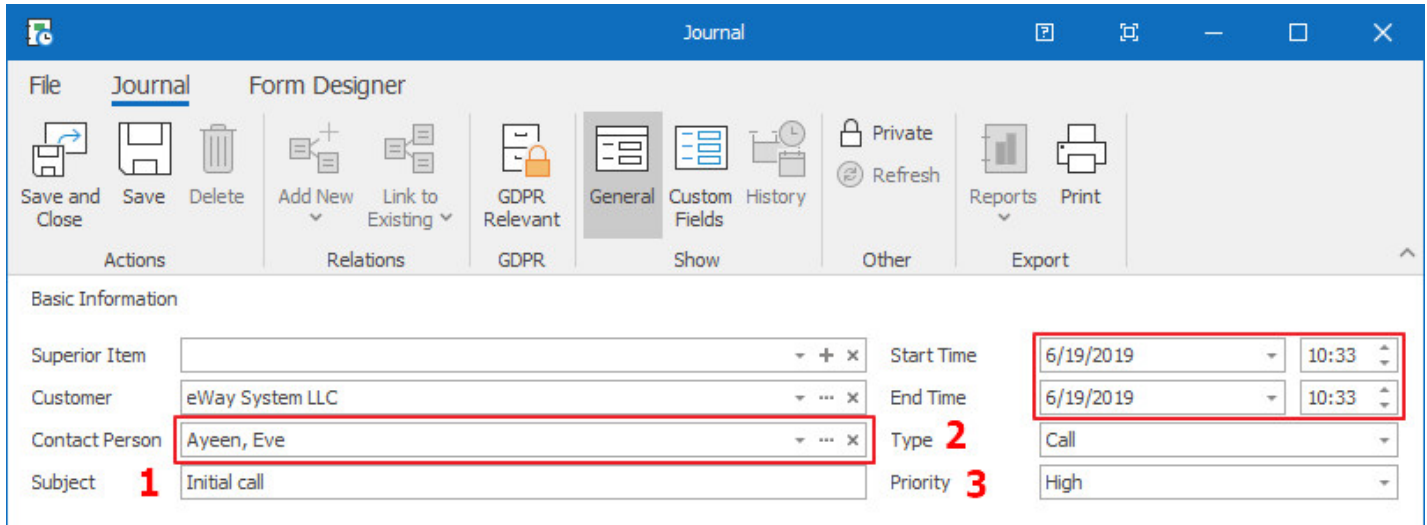
Journals can be used for meeting notes or other notes that pops up in your minds in relation to the contact. You just relate journal with contact and always have access to the note. Journal on contact can be created by these steps:

1. Open a Contact.
2. Click **Add New** and choose **Journal**.



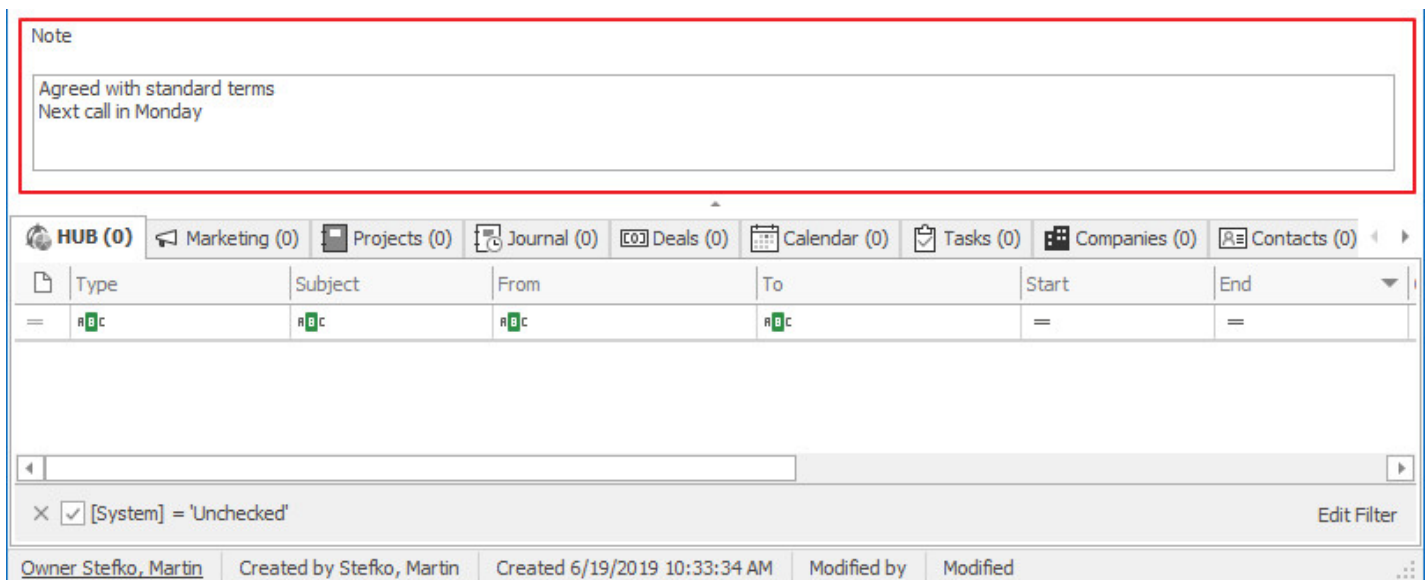
The screenshot shows the eWay CRM interface with the 'Contacts' tab selected. The 'Add New' dropdown menu is open, and 'Journal' is highlighted with a red rectangle. The menu options include Task, Journal, Category, Document, Email, Calendar, Company, Contact, Deal, Project, and Bookkeeping Record. The background shows the 'Basic Information' section of a contact record for 'Ayeen, Eve'.

- The *Journal* card will pop up with the prefilled **Contact**, **Start Time** and **End Time**. Additionally, you can specify other fields:



Number	Description
1	<b>Subject</b> (short description of the activity, e.g. "Initial call," "Follow-up call," "Discussion about ...").
2	<b>Type</b> (the drop-down menu can be customized in the Administration Settings: <i>Module Settings</i> > <i>Drop Down Menus</i> > <i>Journal Type</i> ).
3	<b>Importance</b>
	You can also add <b>Superior Item</b> or <b>Company</b> .

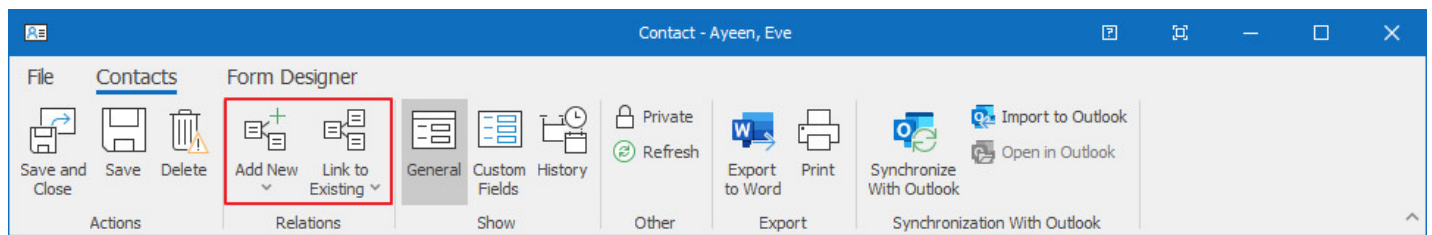
- Use **Note** field to specify details of a call/meeting.



- Click **Save**.
- In the lower half of the *Journal* card, you can attach such related information as:
  - Emails
  - Documents
  - Tasks
  - Calendar events
  - Deals

- Projects
- Companies
- Contacts
- Marketing Campaigns
- Products
- Categories
- Users (team members involved)

To link different modules, you can also use the buttons **Add New** and **Link to Existing** on the top ribbon.



Now, you can find all your activities under the **Journal** tab on the *Contact* card.

Customer	Contact Person	Superior Item	Subject	Type	Start Time	Er
eWay System LLC	Ayeen, Eve		First meeting	Meeting	6/24/2019 10:37 AM	6/
eWay System LLC	Ayeen, Eve		Initial call	Call	6/19/2019 10:33 AM	6/

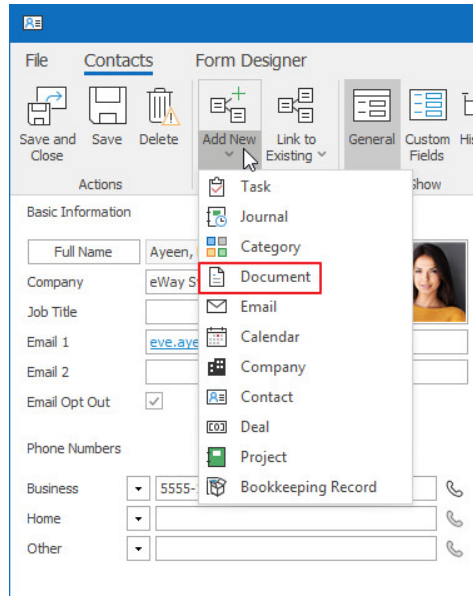
You can filter or group items by any field, e.g. by **Type**.

Type	Customer	Contact Person	Superior Item	Subject	Start Time	Er
Call	eWay System LLC	Ayeen, Eve		Initial call	6/19/2019 10:33 AM	6/
Meeting	eWay System LLC	Ayeen, Eve		First meeting	6/24/2019 10:37 AM	6/

Learn more [here](#).

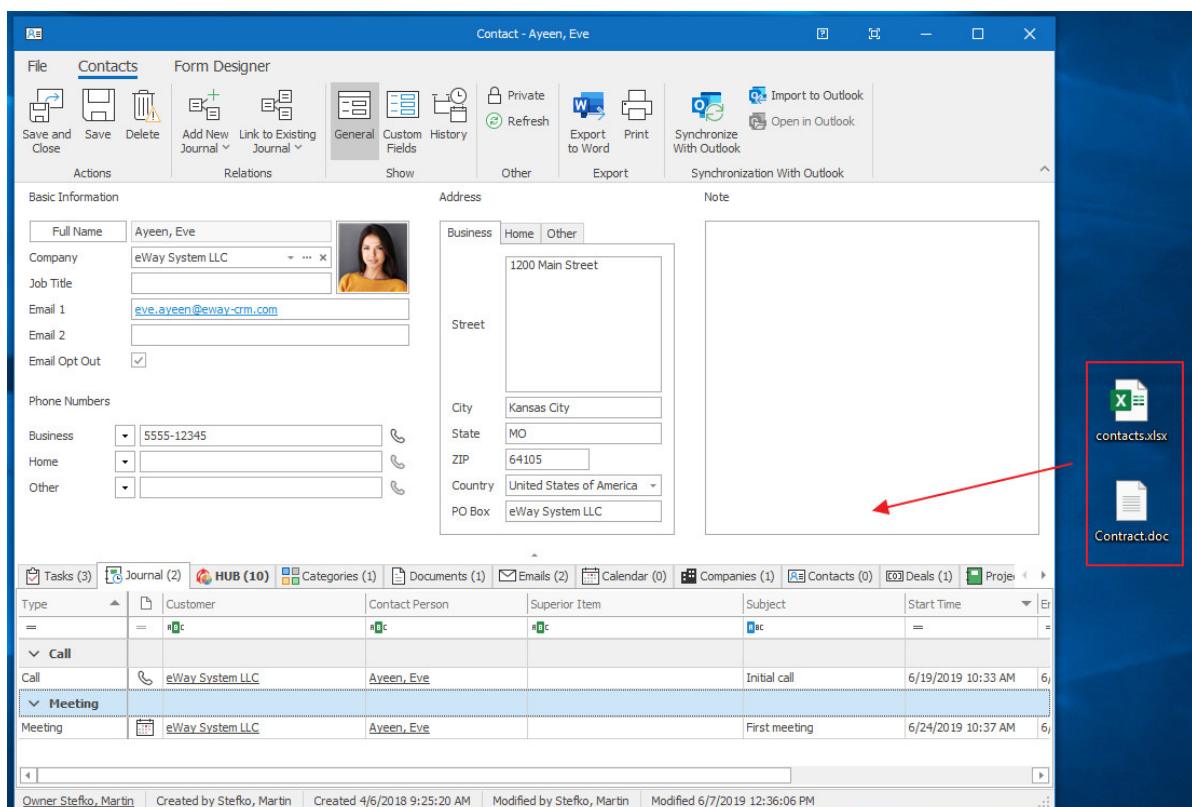
## How to Attach Documents to Contacts

eWay-CRM allows you to insert documents in different ways. The first one, to add it right in the contact window. While working with an item, you can add a document to it by selecting **Add New > Document**.



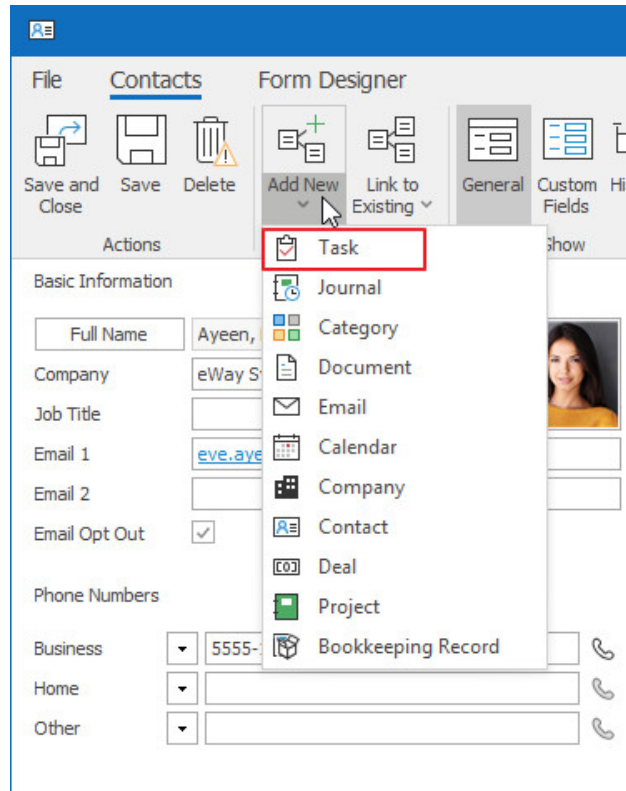
You can also drag and drop document right from your computer to the contact window by following these steps:

1. Open a contact window item.
2. Minimize the window.
3. Drag and drop files from your computer to the window.

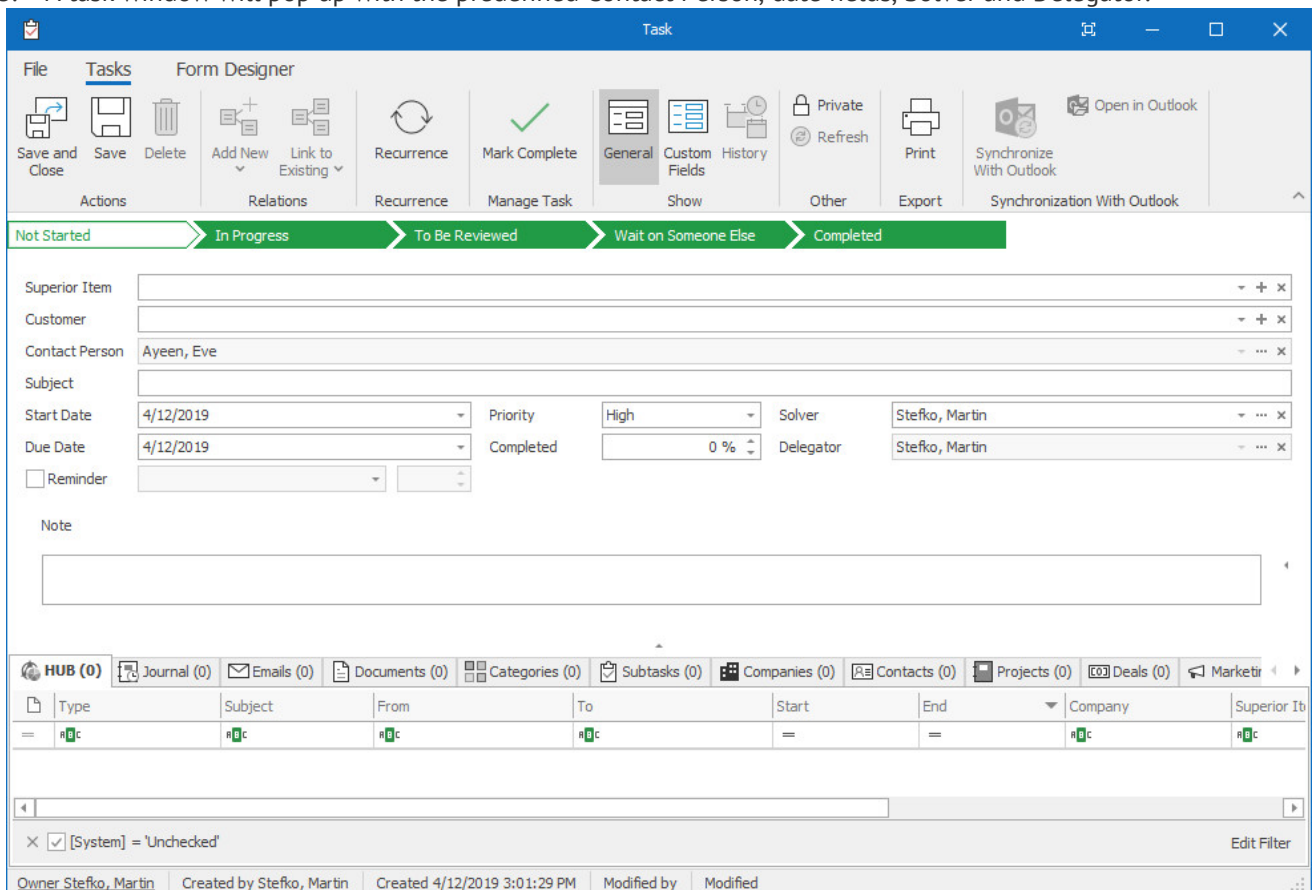


## How to Plan Task or Meeting

1. Open a Contact.
2. Click **Add New** and choose **Task**.



3. A task window will pop up with the predefined Contact Person, date fields, Solver and Delegator.



The screenshot shows the 'Task' window in the eWay CRM. The window has a blue title bar and a ribbon interface with tabs for 'File', 'Tasks', and 'Form Designer'. The 'Tasks' tab is active, showing a ribbon with buttons for 'Save and Close', 'Save', 'Delete', 'Add New', 'Link to Existing', 'Recurrence', 'Mark Complete', 'General', 'Custom Fields', 'History', 'Private', 'Refresh', 'Print', 'Synchronize With Outlook', and 'Open in Outlook'. Below the ribbon, there are several fields for task details:

- Superior Item:** A dropdown menu.
- Customer:** A dropdown menu.
- Contact Person:** A dropdown menu with 'Ayeen, Eve' selected.
- Subject:** A text input field.
- Start Date:** A date picker set to '4/12/2019'.
- Priority:** A dropdown menu set to 'High'.
- Solver:** A dropdown menu set to 'Stefko, Martin'.
- Due Date:** A date picker set to '4/12/2019'.
- Completed:** A progress bar set to '0 %'.
- Delegator:** A dropdown menu set to 'Stefko, Martin'.
- Reminder:** A checkbox and a time input field.
- Note:** A large text area for notes.

At the bottom of the window, there is a status bar with the following information:

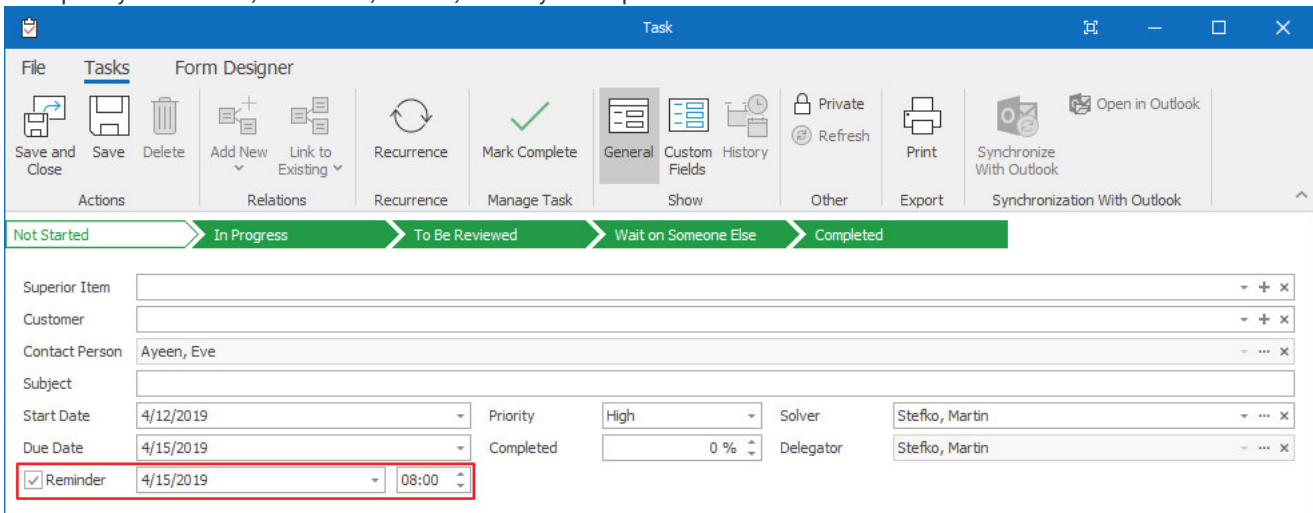
- HUB (0):** A button to open the HUB.
- Journal (0):** A button to open the Journal.
- Emails (0):** A button to open the Emails.
- Documents (0):** A button to open the Documents.
- Categories (0):** A button to open the Categories.
- Subtasks (0):** A button to open the Subtasks.
- Companies (0):** A button to open the Companies.
- Contacts (0):** A button to open the Contacts.
- Projects (0):** A button to open the Projects.
- Deals (0):** A button to open the Deals.
- Market:** A button to open the Market.

The status bar also displays the following information:

- Owner:** Stefko, Martin
- Created by:** Stefko, Martin
- Created:** 4/12/2019 3:01:29 PM
- Modified by:** Modified



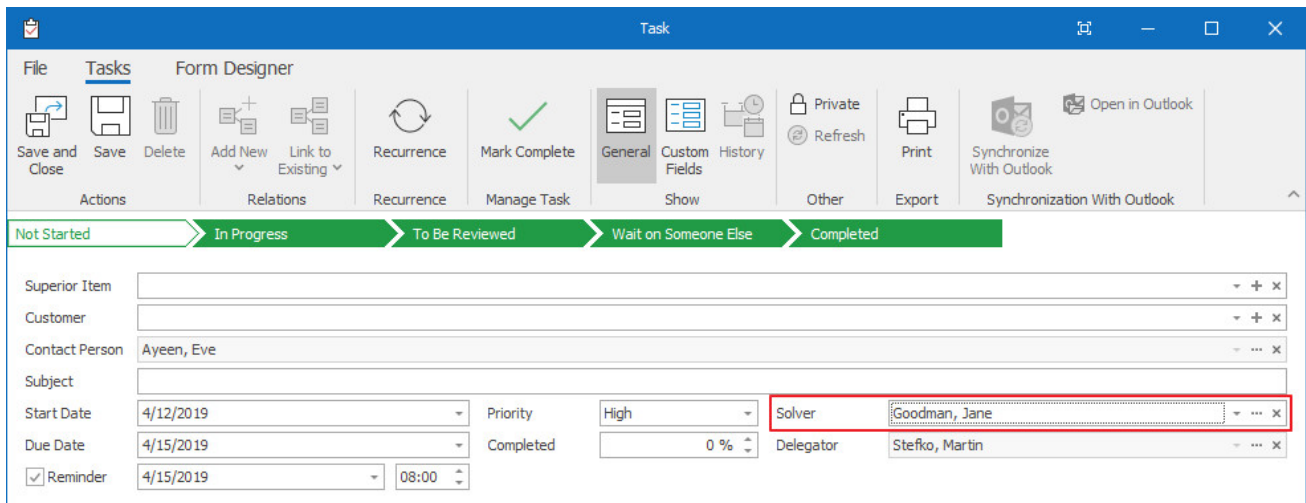
4. Specify Start Date, Due Date, Status, Priority. Set up the **Reminder** if needed.



The screenshot shows the 'Task' form in eWay CRM. The 'Reminder' checkbox is checked, and the date is set to 4/15/2019 and the time to 08:00. The form includes a toolbar with various actions like Save, Delete, Add New, and a progress bar with stages: Not Started, In Progress, To Be Reviewed, Wait on Someone Else, and Completed.

Superior Item			
Customer			
Contact Person	Ayeen, Eve		
Subject			
Start Date	4/12/2019	Priority	High
Due Date	4/15/2019	Completed	0 %
<input checked="" type="checkbox"/> Reminder	4/15/2019	08:00	

5. You may want to assign the task to another person. You just click **Solver** field and select correct user from the list. When you save the task, new solver automatically receives notification about assigning to this task.



The screenshot shows the 'Task' form in eWay CRM. The 'Solver' field is now set to 'Goodman, Jane'. The form includes a toolbar with various actions like Save, Delete, Add New, and a progress bar with stages: Not Started, In Progress, To Be Reviewed, Wait on Someone Else, and Completed.

Superior Item			
Customer			
Contact Person	Ayeen, Eve		
Subject			
Start Date	4/12/2019	Priority	High
Due Date	4/15/2019	Completed	0 %
<input checked="" type="checkbox"/> Reminder	4/15/2019	08:00	
Solver	Goodman, Jane		
Delegator	Stefko, Martin		