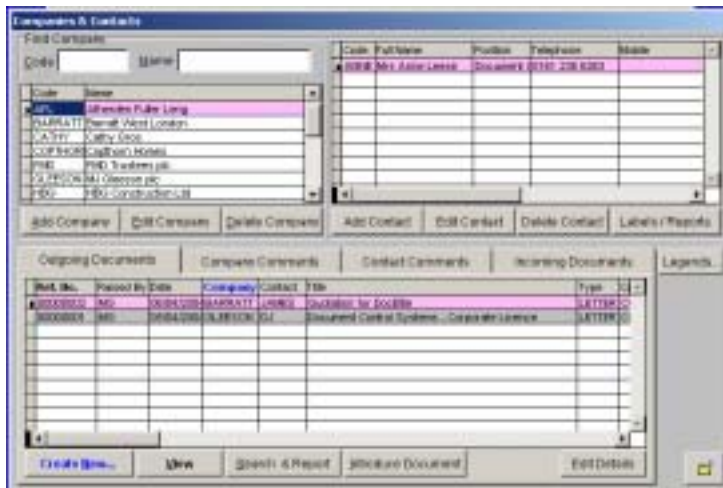# Creating Companies and Contacts for InTouchPro

Companies and contacts are the 'heart' of InTouchPro, if you want to use InTouchPro to create or introduce correspondence, you will need to develop lists of the companies, or organisations, you are dealing with and contacts at those companies.

Each company can only be listed once, but can have as many contacts as you require, in order to add a contact, you must either have an existing company or add one.

To add a company to InTouchPro, start by clicking on the 'Companies, Contacts and Correspondence' button on the main menu.
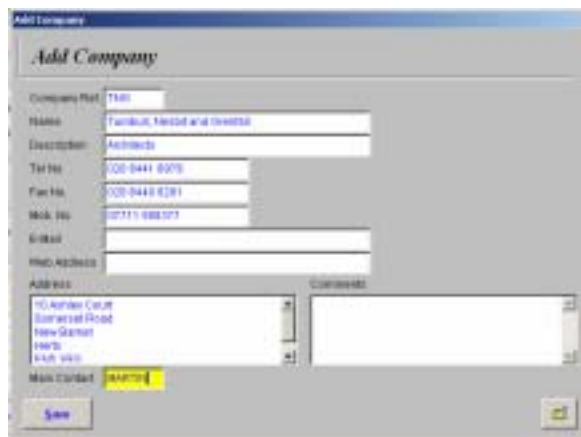

This will result in InTouchPro presenting a form like the one below, - *your form may not display the tab for 'Incoming Documents' as it is an option selected by the InTouchPro administrator.*

If the company you wish to add is not already listed, click on the 'Add Company' button - *if it is, go straight to '**Adding a Contact to an Existing Company**' below:*

InTouchPro will present you with a form like the one below:

For each company you must complete a unique Company reference, this might be a nickname or perhaps an abbreviation of their full name – such as 'ARUP' for 'Ove Arup and Partners' or 'TNG' for 'Turner, Nesbit and Grenfell Ltd'. *Note that this reference cannot normally be changed – although the name and other details can.*

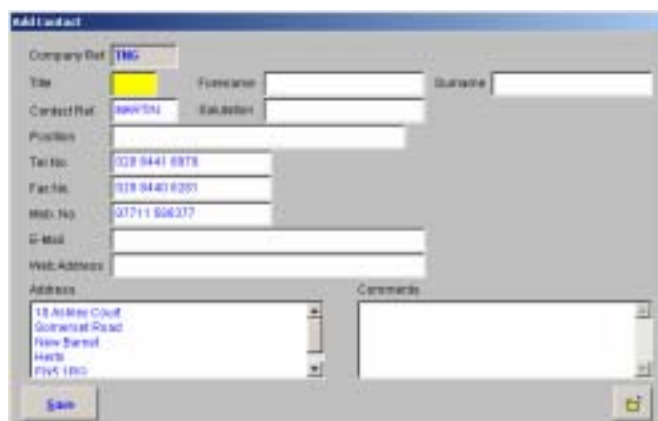The Company reference can be up to 8 characters long.

The other details are pretty self explanatory – *you should put the company name in the box for that and **NOT** repeat it in the address (or it will be printed twice on labels and in documents).*

At the bottom left of the form, there is a box for the name of the main contact – *when you save the company, you will be prompted for the details of the main contact automatically* – again use just the first name, or initials, to identify the main contact.

When you are ready to save the new company – click on the 'Save' button. If the Company reference is unique, InTouchPro will prompt you for the details of the main contact.

Tip: If you might be writing to an unidentified person at the company, make the main contact 'SIRS' then complete their details appropriately.

The form for the main contact will look like this:

Notice that the telephone numbers and address details will have been copied from the company record (in this case TNG) and InTouchPro will have completed the contact reference for you.

InTouchPro will have highlighted the 'Title' box, this is where you would enter 'Mr', 'Mrs', 'Ms', 'Sir' or whatever is appropriate for the contact.

The forename is intended for the 'formal' forename (as would be used on the address of a letter – *'David' rather than 'Dave', or 'Michael' rather than 'Mick'.*

The surname is self explanatory, the salutation will be filled in by default with the forename you enter and should you prefer a less formal greeting for the contact – *such as 'Dear Sue' instead of 'Dear Susan' you can enter it instead.*

The position is generally the contacts job title, which is often included in the address of a letter – *such as 'Mr John Smith, Accounts Manager…'.*

All the contact numbers and address are optional – but the more you put into InTouchPro the more you can get out of it.

Note the 'Comments' box – here you could put entries when you have spoken to the contact, or details of dietary information, should you be organising social events.
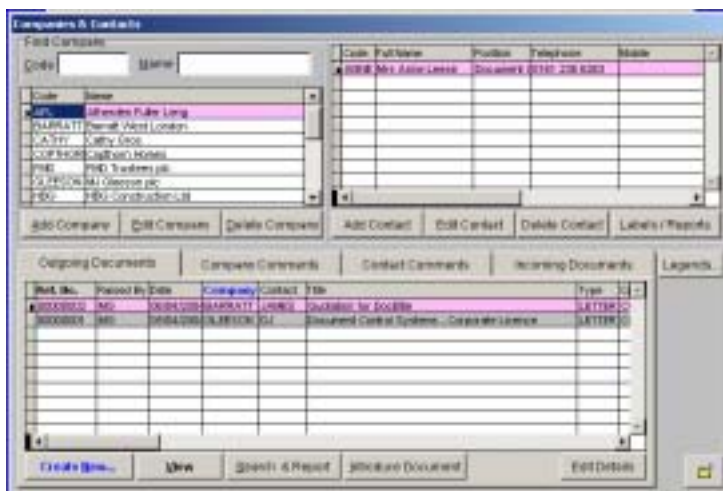
You can add any additional information, or change any of the defaults – and when you are ready, click on the 'Save' button.
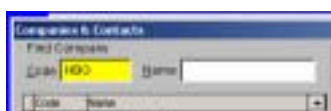
Adding a Contact to an Existing Company

If you already have an entry for the company of interest, and wish to add another contact, you should first open the 'Companies, Contacts and Correspondence' form by clicking on the 'Companies, Contacts and Correspondence' button on the main menu.
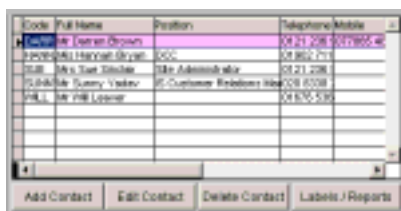

This will result in InTouchPro presenting a form like the one below, (your form may not display the tab for 'Incoming Documents' as it is an option selected by the InTouchPro administrator).

The next step is to locate the existing company, this can be done by scrolling down the companies grid – in the top-left corner – or by typing the beginning of the company reference code, or name, in one of the boxes above it:
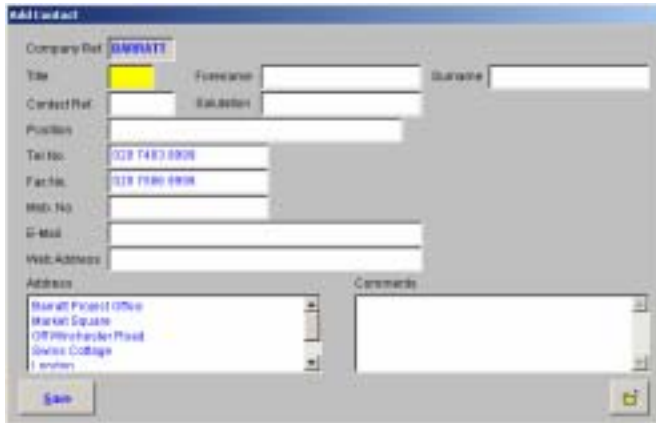

With the company selected – the record will be highlighted – a list of existing contacts will be shown in the second grid, in the top-right corner:

After making sure the new contact is not already there, simple click on the 'Add Contact' button.

InTouchPro will prompt you, asking whether or not to copy the contact details from the company – if you do, click on the 'Yes' button – otherwise click on the 'No' button.

You must complete the 'Contact Ref.' field, but the remainder are optional.

InTouchPro will have highlighted the 'Title' box, this is where you would enter 'Mr', 'Mrs', 'Ms', 'Miss', 'Sir' or whatever is appropriate for the contact.

The forename is intended for the 'formal' forename (as would be used on the address of a letter – *'David' rather than 'Dave', or 'Michael' rather than 'Mick'*.

The surname is self explanatory, the salutation will be filled in by default with the forename you enter and should you prefer a less formal greeting for the contact – *such as 'Dear Sue' instead of 'Dear Susan' you can enter it instead.*

The position is generally the contacts job title, which is often included in the address of a letter – *such as 'Mr John Smith, Accounts Manager…'.*

All the contact numbers and address are optional – but the more you put into InTouchPro the more you can get out of it.

Note the 'Comments' box – here you could put entries when you have spoken to the contact, or details of dietary information, should you be organising social events.

When you are ready, click on the 'Save' button.

Once saved, you will not be able to alter the 'Contact Ref.' or 'Company Ref'.