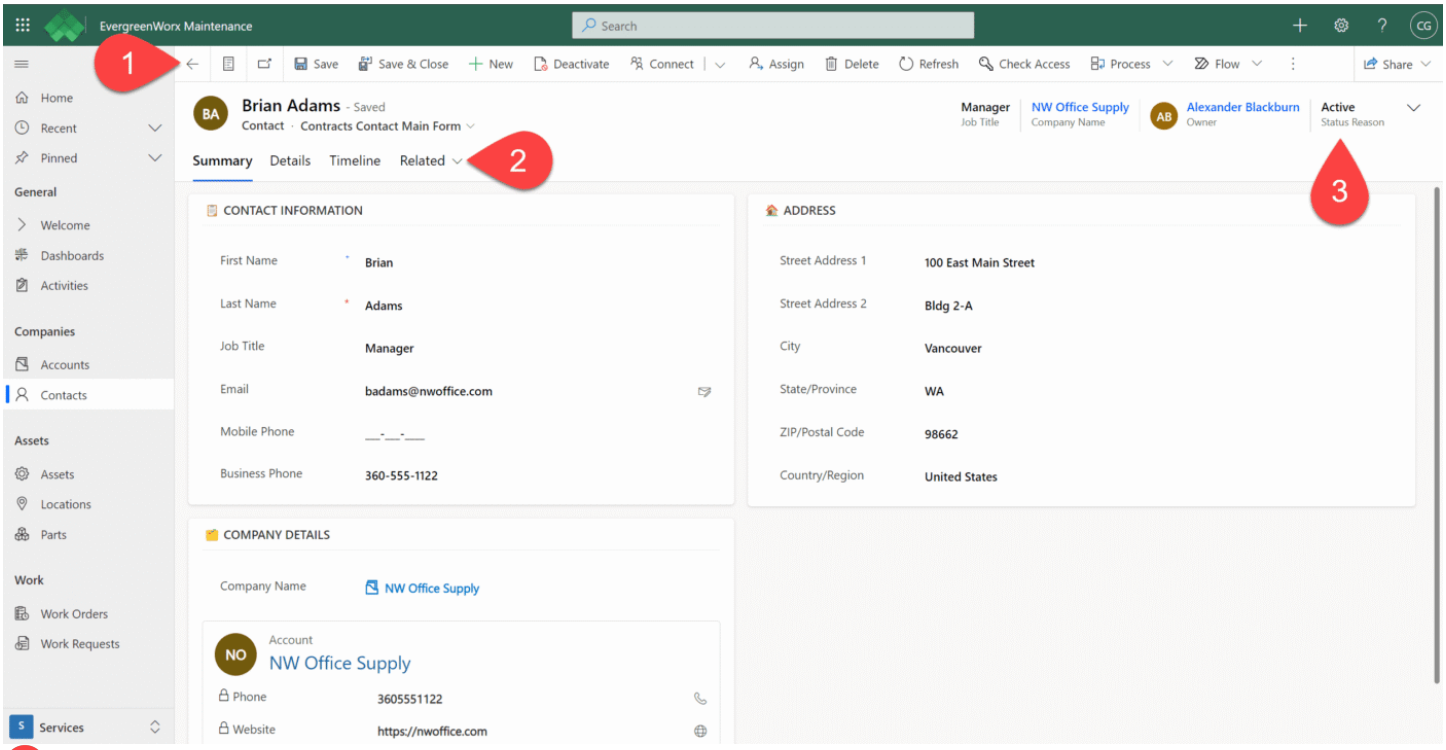
Contacts

General · https://evergreenworx.com/docs/contacts/

The main Contact Record form stores key data about a particular person who may need to be contacted in relation to an Asset or work to be performed.



1 In the ribbon, available actions are displayed for the current Contact record, such as deactivating the record, deleting the record, or running a report. The actions available depend on your security role and permissions.

2 Record forms have tabs that allow the user to move between different data elements of the record. On the Contact record, you will see the following tabs:

- Summary – Primary information about the Contact, such as the company they work for, their job title, and relevant information for getting in touch with them.
- Details – Company information such as personal details, contact preferences, and billing.

- Timeline - Stores historical notes and activities against the record. For more information, see Timeline | EvergreenWorx.
- Related – Other related items, such as Record Audit History and Activities.

3 Contacts have an “Owner” who is responsible for the Record. The Owner can be used in queries throughout the system, allowing users to filter to just records they own (e.g., “My Contacts”).