Address book

Tutorial
Shift
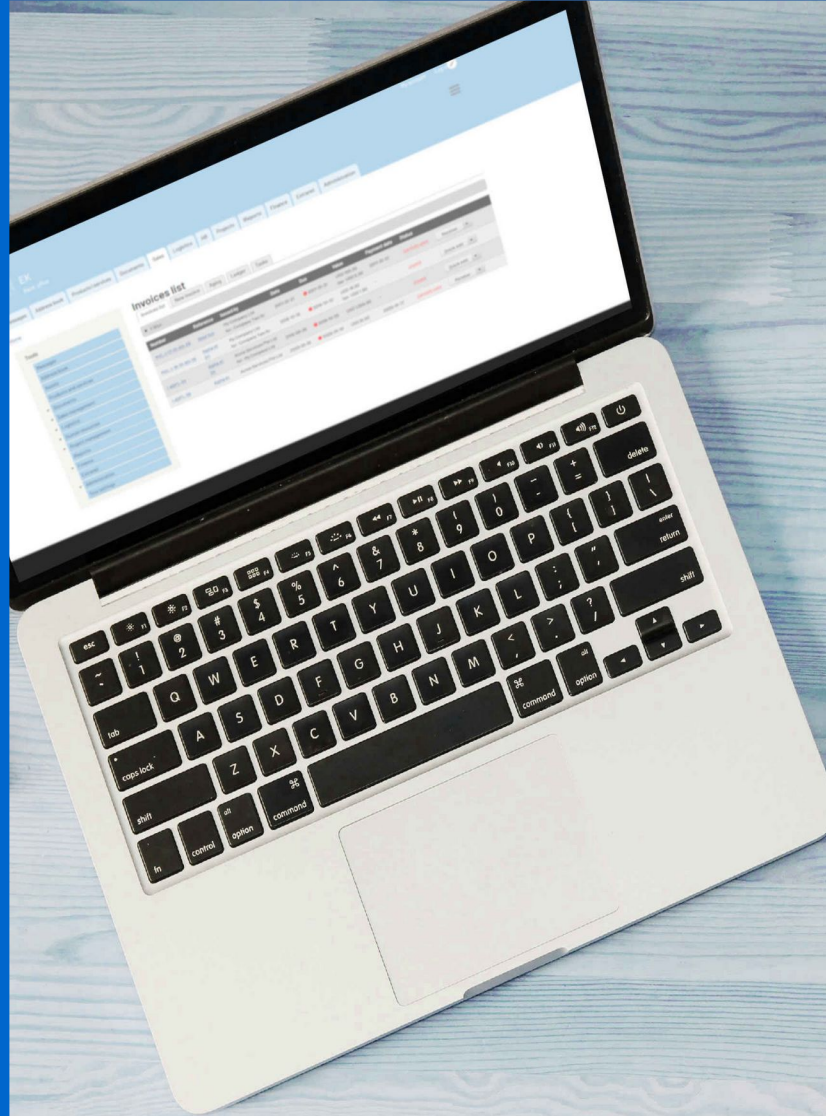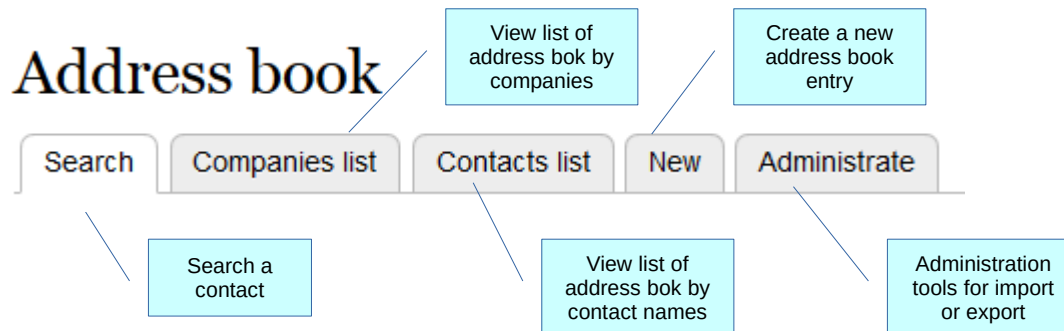
This module keep records of contacts, clients suppliers.
Contacts from address book are used in other modules like sales or logistics

Main address book
page (/address_book)
is made of few tabs

Address book

View list of
address bok by
companies

Create a new
address book
entry

| Search | Companies list | Contacts list | New | Administrate |

Search a
contact

View list of
address bok by
contact names

Administration
tools for import
or export

Address book

Search | Companies list | Contacts list | New | Adminis

best

To search existing entries, simply type the key word, name and select corresponding name in the list

Best Outlet Distribution Ltd (supplier)

Best Outlet Distribution Ltd (client)

Best Outlet store (client)

List display based on keyword

View demo

Address book view

| View | Edit | Delete | Bank info | Sales | Documents |

Edit data tab

Delete data tab

Click for new search

🔍 New search

✎ (last edit 2020-04-11)

Alpha Et Omega

AO

Main company contact and info

📍 ⧉ **Address**

Click to copy address to clipboard

Upper Floor, Gold Tower #8	Mashchauset
Money Street #5	Zong Town
58318	New Zealand

Reg. number:	abc-123
Status:	active
Tags:	Export,retail,manufacturing
Type:	supplier Clone

Click to switch to "supplier" type

📞 **Contact**

Tel 989-5548551   Fax 989-5548558

www.example.com

List of contacts details

👥 Name cards

Click add new contact

➕ Add contact
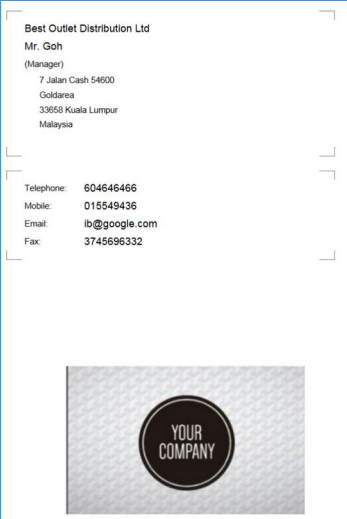
Mr. Goh

Click to copy contact to clipboard

👤 | Goh

💼 | Manager

🏷 |

📞 | 604646466

▯ | 015549436

✉ | ib@google.com

🔗 |

💬

name card image

YOUR COMPANY
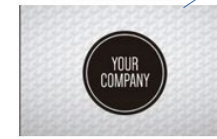
📄 Pdf

Export details in Pdf format

Mr. K John

👤 | K John

💼 | Engineer

🏷 |

📞 | 6046455466

▯ | 015679436

Best Outlet Distribution Ltd
Mr. Goh
(Manager)
   7 Jalan Cash 54600
   Goldarea
   33658 Kuala Lumpur
   Malaysia

Telephone:	604646466
Mobile:	015549436
Email:	ib@google.com
Fax:	3745696332

YOUR COMPANY

New entry

Url: /new_contact

Edit address book

View | Edit | Delete | Bank info | Sales | Documents

Alpha et Omega
Organization name

AO
Short name

abc-123
registration number

Status

active
(status dropdown)

Short name is auto generated but can changed manually

Upper floor, Gold Tower #8
Address line 1

Zong town
City

58318
Postcode

Address line 1 & 2

City, state

Money street #5
Address line 2

Mashchauset
State

New Zealand

Country

989-5548551
Telephone

989-5548558
Fax No.

www.example.com
Web site

Tel, Fax and web

supplier
Organization type

Head office
Organization category

export ×   retail ×   manufacturing ×
Tags

Activity tags, use for classification and searches

Type, client, supplier or other

Upload logo
Browse... No file selected.

Logo upload

delete logo:

▼ New contact card No. 1

Johanne Lee

☑ Set as primary

You must have **1 primary** contact

Mrs.

You can add more salutation with taxonomy

Title or function

Telephone

Mobile phone

Email address

By default you can add 1 contact card. You can add more later when editing

Upload a name card image
Browse... No file selected.

You can upload scanned image of namecard

Department or office

Social network

You can input free text as comment

Record

Address book view

View | Edit | Delete | Bank info | Sales | Documents

Last record stamp

Back to search tab

🔍 New search

✎ (last edit 2019-10-18)

Alpha Et Omega

AΩ

AO

Click to copy to clipboard

📍 🗐 **Address**

Upper Floor, Gold Tower	Mashchauset
Money Street #5	Zong Town
58318	New Zealand

Reg. number:	abc-123
Status:	active
Tags:	Export,retail,furniture
Type:	client <->

Entry type

📞 **Contact**

Tel 989-5548552	Fax 989-5548558
www.example.com	

Add new contact to this book

➕ Add contact

👥 **Name cards**

Attached name card

MR. JOHN DEUX

Click name to copy to clipboard

👤 | John Deux

💼 | Purchase Director

🏷️ |

📞 | 60355111

📱 | 6012665888

✉️ | john.foo@alphanomega.net

🔗 |

💬

📄 Pdf

Add new name

There are 2 options to add names to existing address book entry:

1) copy existing from another entry;

2) record a new name card

Back to address book

▼ Copy existing card

Enter names to copy

jo

Khol John [Best Outlet Distribution Ltd | client]

Brown Jo [Bright Garment Pte ltd | supplier]

John Deux [Alpha et Omega | client]

John Garry [Best Outlet Distribution Ltd | supplier]

John German [J English | client]

Johanne Lee [ADTe Services | client]

John Deux [Alpha et Omega | supplier]

Johanne Lee [Alpha et Omega | supplier]

▼ Ne

C

Rec

Attach existing name card to address book entry

▼ New contact card

John Deux

Mr. ▼

Title or function

Telephone

Mobile phone

Email address

Upload a name card image

Browse... No file selected.

Department or office

Enter new data

When **finance module** is available, you can add bank reference info to the address book

Edit address book

| View | Edit | Delete | Bank info | Sales | Documents |

▼ Bank information

Existing record can be edited

▼ Edit : Bank of Bermuda

Bank of Bermuda

address 1

address 2

1800-AB

Netherlands

123458-5548

5006

BBMNXXXX

Existing record

▶ Edit : Biz Dev Bank

▼ Add new

bank name

Add bank name to add **new** record

Record

Bank references

| View | Edit | Delete | Bank info | Sales | Documents |

Bank information per address book entry can be viewed in separate tab

Name :	Bank of Bermuda
Address :	address 1 address 2 1800-AB Netherlands
Account :	123458-5548
Swift :	BBMNXXXX
bank code :	5006

Name :	Biz Dev Bank
Address :	address 1 address 1 12345-6 New Zealand
Account :	9578845-55-61
Swift :	DDBNZOPXXX
bank code :	100

You can duplicate existing entry from one type to another

Edit address book

| View | Edit | Delete | Bank info | Sales | Documents |

International NewCo
Organization name

data of original entry under different type. You can then edit information of the cloned entry.

reg. number
registration number

active

| address 1 | City | 12345 |
| Address line 1 | City | Postcode |

| address 2 | State | Belgium |
| Address line 2 | State | |

| Telephone | Fax No. | Web site |
| Telephone | Fax No. | Web site |

supplier   Head office   travel-leisure ×
Organization type   Organization category   Tags

Upload logo
Browse...   No file selected.

▶ Contact card No. 1

Existing name card is copied

▼ New contact card No. 2

Contact name

New contact

Record

View demo

Taxonomy example

In admin menu go to:

/admin
/structure/taxonomy
/add

View demo

Add vocabulary ☆

Home » Administration » Structure » Taxonomy

Name *

salutation

Machine name: salutation [Edit]

Description

Contact name salutation, i.e. "Mr."

Save

Add vocabulary with name **"salutation"**

salutation ☆

| List | Edit | Manage fields | Manage form display | Manage display |

Home » Administration » Structure » Taxonomy » Edit *salutation*

✓ Created new vocabulary *salutation*.

You can reorganize the ter...   handles, and group terms

+ Add term

In "salutation", add items

Add term ☆

Home » Administration » Structure » Taxonomy » Edit *salutation*

Name *

Doktor

Description

| B | I | 🔗 | | ⋮☰ | ⋮☰ | 〞 | 🖼 | E | 🔲 | Normal | ▾ | Source |

Doctor

Add salutation title and "save"

Save

Delete address book

| View | Edit | Delete | Bank info | Sales | Documents |

🔔 This address book entry cannot be deleted.

Used in finance, products & services, sales

Back

Address book entry cannot be
deleted if used in other modules

Delete address book

| View | Edit | Delete | Bank info | Sales | Documents |

ADTe Services (supplier)

Confirm delete (including attached namecards)

Confirm deletion
including name card
attached to this entry

Company list view

List of companies in address book

| Search | Companies list | Contacts list | New | Administrate |

Type first letters to filter by name

b

Ex. 'a' or 'go'

You cn filter the list by keyword

Apply

name ▲	type
Bekalan PIT Sdn Bhd	Supplier
Best Outlet Distribution Ltd	Client
Best Outlet Distribution Ltd	Supplier
Best Outlet store	Client
Blue globe	Client
Booknote editions Ltd	Supplier
Bright Garment Pte ltd	Supplier

Filtered result.
Click to view address
book data

Type of entry

Contacts list view

Search	Companies list	Contacts list	New	Administrate

contact name ▲	salutation	title	company name	✎
Goh	Ms	Manager	Best Outlet Distribution Ltd	
Johanne Lee	Mrs.	Manager	International NewCo	
Johanne Lee	Mrs.	Manager	International NewCo	
John		Manager		
John				
John Doe	Mr.	Purchase director	Alpha et Omega	
Karl		Sales		
Lee	Mr	Manager	Booknote editions Ltd	
Marie		Producer		
Mr B	Mr.		CARREFIVE	
Mr Fuir			Hurban Merlin	
Mr John	Mr.	Engineer	Best Outlet Distribution Ltd	

« first   ‹ previous   1   **2**   3   next ›   last »

If **sales module** is available statistics can be viewed from address book entry

Address book view

| View | Edit | Delete | Bank info | Sales | Documents |

(last edit 2020-04-24)

Alpha Et Omega

AO

Access sales and other business data from sales, projects or report modules for this client or supplier

Sales data

View | Edit | Sales

Alpha et Omega

| Comments [edit] | Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum. [admin] – 2017-11-10 |

Documents attached

toggle deleted files

| 📗 plan.xlsx | project | 🗑 | 🔒 |

Select file: | Browse... No file selected. | comment | Upload

Projects

> If project module is available

A-CA-6_09-BP-313	SINGAPORE	2009-06-01	Deco and supply	completed
A-CA-6_09-BP-311	SINGAPORE	2014-01-16	Project design and supply	open
MVL-Aa-SG-2014_11-AO-15_sub2	CAMBODIA	2014-12-23	Consulting service	open
MVL-Aa-MY-2014_12-AO-18	MALAYSIA	2014-12-23	Repair and maintenance 2	awarded
MVL-D-SG-2016_01-AO-120	SINGAPORE	2016-01-04	New house	awarded
A-MVL-MY-2016_08-AO-125	MALAYSIA	2016-08-18	Yuti	open
A-MVL-SG-2016_10-AO-126	SINGAPORE	2016-10-11	New notif 2	open

Reports

> If report module is available

| RP-2-01_16-8 | 2016-01-06 |
| RP-2-01_16-9 | 2016-01-06 |

Sales statistics

If **sales module** is available statistics can be viewed from address book entry
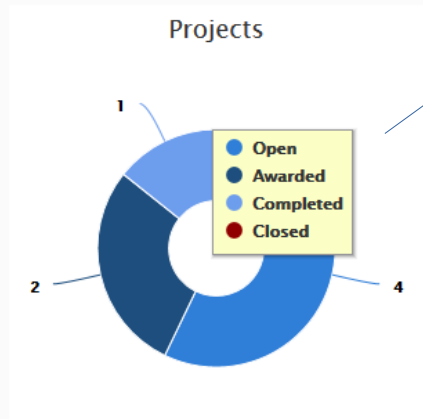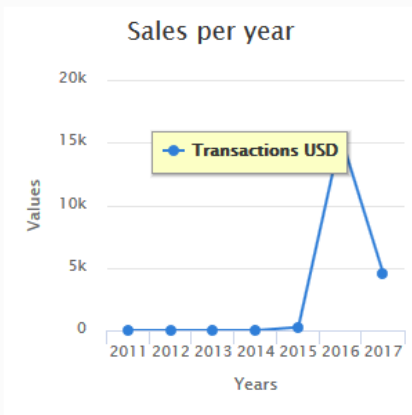
Sales or purchases data

Requires "charts" module

Statistics

Projects by status

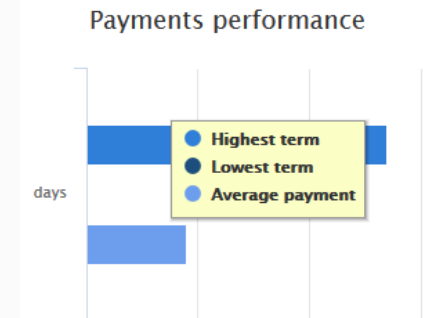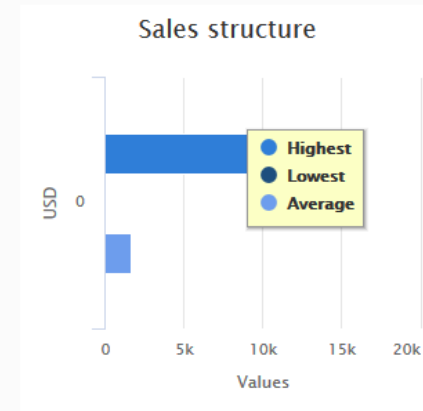| Open	Awarded	Completed	Closed
4	2	1	
7			

Projects by year

2011

2012

2013

2014 | General trade : 1 | Item production : 1 | Design : 1

2015

2016 | General trade : 1 | Consulting : 1 | Design : 1

2017

Sales

Total transactions : **19,751 USD**

Sales per year (chart)

Projects (chart)
- Open
- Awarded
- Completed
- Closed

Sales structure (chart)
- Highest
- Lowest
- Average

Payments performance (chart)
- Highest term
- Lowest term
- Average payment

Documents

Sales statistics

If **sales module** is available you can store documents per address book

| View | Edit | Delete | Bank info | Sales | Documents |

Documents tab

Alpha et Omega

Select file: Browse... No file selected. | folder ○ | comment | Upload

Upload new file

Classified by folder

CONTRACT

📄 Agent agreement 2019.pdf   test   🗑 🔒

IMAGE

🖼 receipt1.jpg   🗑 🔒

🖼 computer_table_s_380.png   Document not available. Please contact administrator   🗑

You can move file from one folder to another one

Delete icon
Manage user access

Access

Access control dialog

By default access is given to users who have access to the address book unless custom access has been defined by owner. Use "Ctrl C" to select multiple users in the box below.

Restricted
| admin |
| user2 |

⇄

Allowed
| user |

Save

Warning: import and export process may be critical. Make sure you have a backup before proceeding

Address book administration

| Search | Companies list | Contacts list | New | Administrate |

Import | Export

There are 2 administration tasks: import and export

The export format is in excel.
The table extracted can be re-used as format template for importing of data

Address export

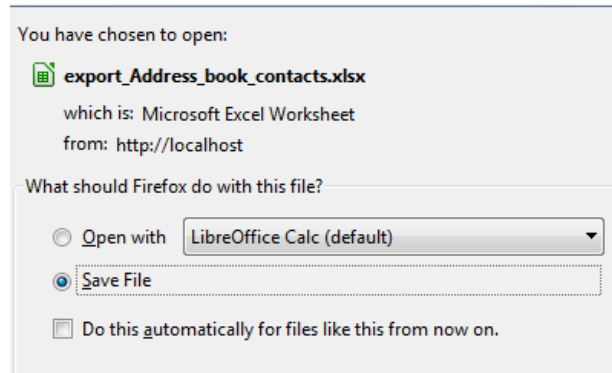| Search | Companies list | Contacts list | New | Administrate |

Import | Export

All types ▼ ——— You can choose the type to export:
all, clients, suppliers, others

Contacts ▼ ——— You can choose data to export:
companies or name cards contacts

The export format is in excel. You can re-use the export file structure to import new data in csv format.

Export

You have chosen to open:

📗 **export_Address_book_contacts.xlsx**

    which is: Microsoft Excel Worksheet
    from: http://localhost

What should Firefox do with this file?

○ Open with   LibreOffice Calc (default) ▼
● Save File

☐ Do this automatically for files like this from now on.

Administration tasks

Import

The import format is in csv file.
The excel table from export can be re-used as format template and saved as csv format for import

Address import

| Search | Companies list | Contacts list | New | Administrate |

Import | Export

Contacts ▼

> You can choose data to import companies or name cards contacts

Insert (add to existing) ▼

> You can choose theimport mode: add or replace

, : comma ▼
delimiter character

" : double quote ▼
enclose character

> Select delimiter and enclosure characters based on you csv format

Upload data file

Browse... imoprt_Address_book_contacts.csv

> CSV format file to import

The import format should be a text csv file. You can re-use the export file structure to import new data.

Import

> Example of CSV file structure created with excel table with 1 row entry

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	id	name	shortname	address	address2	postcode	city	country	telephone	fax	website	type	category	status	stamp	activity
2	1	Jolly test	JOT	address 1	address 2	J778	Juiguo7	Loopy	132	465	"	3	store	1	1970-01-01	test
3																

```
id,name,shortname,address,address2,postcode,city,country,telephone,fax,website,type,category,status,stamp,activity
1,Jolly test,JOT,address 1,address 2,J778,Juiguo7,Loopy,132,465,'',3,store,1,1970-01-01,test
```

> Text file separated by commas

✓ Inserted 1 row(s)