

## Address book



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


Search


Companies list


Contacts list

Administrate

best

 Best Outlet Distribution L Ltd (client)

 Best Outlet store (client)

 Best Outlet Distribution L Ltd (supplier)

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

List display based on keyword

## Search results

### 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



Address

Click to copy address to clipboard

Upper Floor, Gold Tower #8

Mashchauset

Money Street #5

Zong Town

58318

New Zealand



Contact

Tel 989-5548551

Fax 989-5548558

www.example.com

Reg. number:

abc-123

Status:

active

Tags:

Export,retail.manufacturing

Type:

supplier [Clone](#)

Click to switch to "supplier" type

Main company contact and info

List of contacts details



Name cards

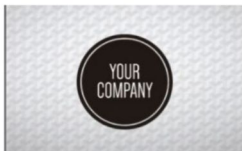
+ Add contact

Click add new contact

## Ex. of pdf export

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

Telephone: 604646466  
Mobile: 015549436  
Email: [ib@google.com](mailto:ib@google.com)  
Fax: 3745696332



Mr. Goh

Click to copy contact to clipboard



Goh



Manager



|



604646466



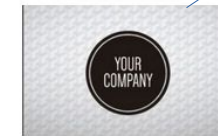
015549436



| [ib@google.com](mailto:ib@google.com)



|



name card image

Pdf

Export details in Pdf format

Mr. K John



K John



Engineer



|



6046455466



015679436



New entry

Url: /new\_contact

## Edit address book

ViewEditDeleteBank infoSalesDocuments

Alpha et Omega

Organization name

AO

Short name

abc-123

registration number

Status

active

Short name is auto generated but can changed manually

Upper floor, Gold Tower #8

Address line 1

Money street #5

Address line 2

City, state

Zong town

City

Mashchauset

State

58318

Postcode

New Zealand

Country

Tel, Fax and web

989-5548551

Telephone

989-5548558

Fax No.

www.example.com

Web site

Type, client, supplier or other

supplier

Organization type

Head office

Organization category

export

retail

manufacturing

Tags

Activity tags, use for classification and searches

Upload logo

Upload logo

No file selected.

Logo upload

delete logo:

New contact card No. 1

Johanne Lee

Set as primary

Mrs.

Title or function

Telephone

Mobile phone

Email address

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

Top ↑

## 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



Click to copy to  
clipboard

A0

 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](http://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

 I

 | 60355111

 | 6012665888

 |john.foo@alphanomega.net

 I





 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]

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

## Bank Information

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 :	BBMNXXX
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

Clone example

You can duplicate  
existing entry from one  
type to another

View demo



Top ↑

## Edit address book

View
Edit
Delete
Bank info
Sales
Docum

International NewCo
Organization name

reg. number
active

registration number

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

When cloning an entry it replicates all data of original entry under different type. You can then edit information of the cloned entry.

Existing name card is copied

New contact

## Taxonomy example

In admin menu go to:

/admin  
/structure/taxonomy  
/add

View demo



Top ↑

### Add vocabulary ☆

[Home](#) » [Administration](#) » [Structure](#) » [Taxonomy](#)

**Name \***

salutation

Add vocabulary with name  
"salutation"

Machine name: salutation [Edit]

**Description**

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

Save

### salutation ☆

List

Edit

Manage fields

Manage form display

Manage display

[Home](#) » [Administration](#) » [Structure](#) » [Taxonomy](#) » [Edit salutation](#)

✓ Created new vocabulary *salutation*.

You can reorganize the terms, add new terms, delete terms, handle, and group terms.

In "salutation", add items

+ Add term

### Add term ☆

[Home](#) » [Administration](#) » [Structure](#) » [Taxonomy](#) » [Edit salutation](#)

**Name \***

Doktor

Add salutation title and "save"

**Description**


**B** *I* | | | **E** | Normal | Source

Doctor

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

Search Companies list Contacts list New Search documents Administrate

List of companies in address book

Type first letters to filter by name

Ex. 'a' or 'go'

filter the list by  
keyword

Apply

name ▲	type
<a href="#">Bekalan PIT Sb</a>	Supplier
<a href="#">Best Outlet Distribution Ltd</a>	Client
<a href="#">Best Outlet Distribution Ltd</a>	Supplier
<a href="#">Best Outlet store</a>	Client
<a href="#">Blue globe</a>	Client
<a href="#">Booknote editions Ltd</a>	Supplier
<a href="#">Bright Garment Pte ltd</a>	Supplier

Filtered result.  
Click to view address  
book data

Type of entry

## Contacts list view

List of contacts in address book

Search Companies list **Contacts list** New Search documents Administrate

contact name ▲	salutation	title	company name
<a href="#">Daniel Thong</a>	Mr.	GM	Retail sale
<a href="#">Derrick Lan</a>	Mr.	d2	
<a href="#">Dody Boh</a>	Mr.		Retail sale
<a href="#">Donny Wilk</a>	Mr.	Executive	
<a href="#">Donny Wilk</a>	Mr.	Executive	Elpha Management
<a href="#">Fuir Loin</a>	Mr		Hurban Merlin
<a href="#">Fuir Loin</a>	-		Hurban Merlin
<a href="#">Goh Chok</a>	Ms	Manager	Best Outlet Distribution Ltd
<a href="#">Goh Kart</a>	Mr.	Manager	Best Outlet Distribution Ltd
<a href="#">Goh Wee Fast</a>	Mrs.		Goh Wee Fast
<a href="#">Isipadu Li</a>	Ms		Spritzer
<a href="#">Johanne Lee</a>	-	Director	Alpha et Omega

« first » « previous » 1 2 3 4 5 next » last »

Browse list pages

## Sales statistics

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

### Address book view

[View](#) [Edit](#) [Delete](#) [Bank info](#) [Sales](#) [Documents](#)

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

 (last edit 2020-04-24)

Alpha Et Omega



A0



## Sales statistics

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

## 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:

No file selected.

#### Projects

If project module is available

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

#### Reports

If report module is available

<a href="#">RP-2-01_16-8</a>	2016-01-06
<a href="#">RP-2-01_16-9</a>	2016-01-06

## Sales statistics

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

### Statistics

Sales or purchases data

#### 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

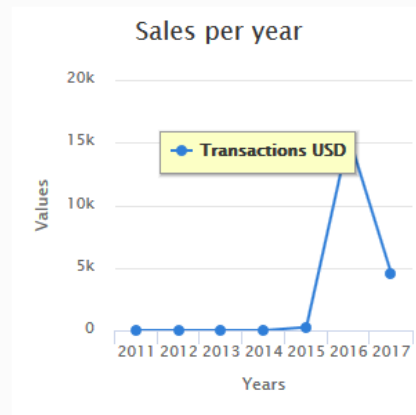
2015

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

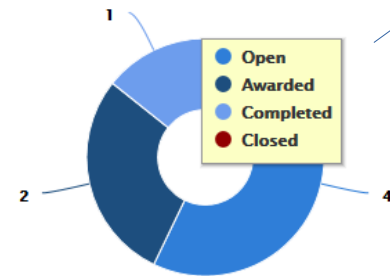
2017

#### Sales

Total transactions : **19,751 USD**

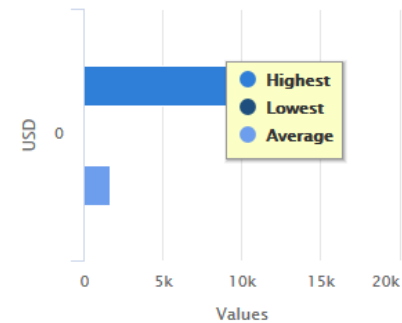


#### Projects

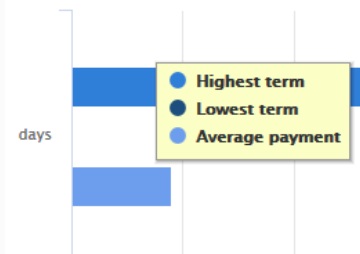


Requires "charts" module

#### Sales structure



#### Payments performance



Sales statistics

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

## Documents

View Edit Delete Bank info Sales Documents

Documents tab

### Alpha et Omega

Select file:  No file selected. folder ☐ comment

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



Delete icon  
Manage user access

You can move file from one folder to another one

### Access

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



Access control dialog

Save

## Search documents

If **sales module** there is form available to quickly search documents linked to address book

# Search documents

Search Companies list Contacts list New Search documents Administrate

Search documents in main menu

a

Type keyword

Search results

*ambc.jpg* - 2019-01-27 - 10 Kb

Alpha et Omega [Folder 2]

Indicates that the file is locked for sharing

**Agent agreement 2019.pdf** - 2019-09-23 - 3068 Kb

Alpha et Omega [contract]

Link to document folder

Address book entry name

## Administration tasks

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](#) [Search documents](#) [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
Search documents
Administrate

Import
Export

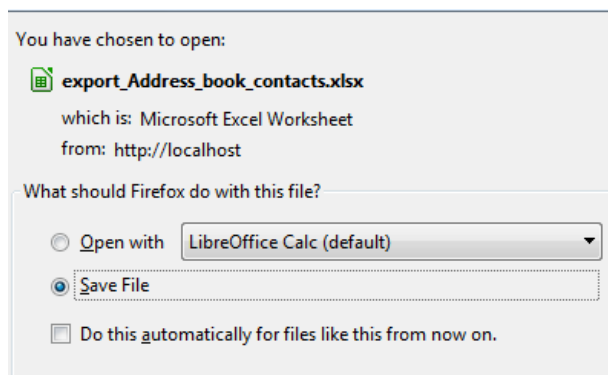
All types
Contacts

You can choose the type to export:  
all, clients, suppliers, others

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



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 Search documents Administrate

Import Export

Select source \*

Contacts

You can choose data to import companies or name cards contacts

Select mode \*

Insert (add to existing)

Select mode: add or replace

, : comma

delimiter character

Select delimiter and enclosure characters based on you csv format

" : double quote

enclose character

Upload data file

Browse...

Address\_book-8.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)



