

## Contact Manager

Fast and intuitive look-up and update processes of business partner and / or address records

All functionalities  
of the Classic Line  
Business Partner Pool  
are now available on  
STREAM

A common issue that companies face is the need to search and retrieve all data of a contact. This information should be detailed but easy to grasp and work with – and it should be available at the touch of a button.

The Contact Manager links directly to Klopotek's system-wide Business Partner pool and provides fast and intuitive look-up and update processes of business partner and / or address records. This Web App is a STREAM module to complement the Klopotek publishing suite.

### KEY FEATURES AND BENEFITS

- Search and navigate easily through business partner data
- Enter and update address information quickly
- Mirrors the role-based security concept of the "Business Partner" module
- Single click dialing and e-mail
- Integrated with the Klopotek "Business Partner" module
- API support for external feeds and uploads, and best-of-breed software tools
- Optimized for seamless integration with other STREAM apps

**WEB** Contact Manager

**CONTACT DETAIL**

Contact No. 887-95475-2348  
**Ms. Ella Glowczewski**  
 Roles: Publisher, Prospect, Author

**CONNECTED BUSINESSES**

Software Solutions  
 > Klopotek AG  
 hotline@klopotek.de  
 +49 30 884 53 0

Software Solutions  
 > Klopotek UK Ltd.  
 www.klopotek.co.uk  
 +44 7947 364146

Software Solutions  
 > Klopotek North America, Inc.  
 www.klopotek.com  
 +1 973 331 1010

**CONNECTED ADDRESSES**

959 Route 46  
 Suite 503  
 Parsippany, NJ 07054  
 U.S.A.

29 Washington Street  
 Apt. 3  
 New York NY 09000  
 U.S.A.

**ASSOCIATED COLLEAGUES**

Business Contacts (Klopotek AG)

Raud Gerritsen	+31 20 521 00 83 R.Gerritsen@klopotek.com
Ernst Lopez	+31 20 521 00 77 E.LopesCardozo@klopotek.nl
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Frédéric Aurand	+33 1 71 39 70 32 F.Aurand@klopotek.fr
Barbara Bruels	+31 6 12 91 47 12 B.Bruels@klopotek.d

**ADDRESS CHARACTERISTICS**

Business Unit: Business Unit 3

Taxation

Sales Tax Free region: ☐

**IDENTIFIERS**

Orcid ID	14020702
Oracle ID	#665480646a-980n
Oracle ID	8888123000-oo-xa-12313

**PRIMARY COMMUNICATION**

Telephone: +1 646 730 0086  
 Mobile Phone: +49 30 884 53 0  
 E-Mail: ella.Glowczewski@klopotek.com

**ACCOUNT NUMBERS**

Contact No: 887-95475-2348  
 Address No: 998-962134-1231-0000  
 Creditor No: 998-962134-1231-0000  
 Business Partner No: 998-962134-1231-0000

**POSTAL ADDRESS**

Type: Business

Address No: 12837-466456-123466

Address: 959 Route 46 Suite 503 Parsippany 07054 New Jersey U.S.A.

Telephone: +1 646 730 0086

Add note for communication here

## Integrated DAM

All types of documents including your complete e-mail communication can be ingested and processed directly by utilizing Klopotek's Digital Asset Management tool.

A common problem is the need to search and retrieve e-mail communication which is often only in the e-mail box of your colleagues. With letters, contracts, quotes, images, and external links all stored centrally, they are all accessible directly from the Contact Manager.

Can be integrated with the STREAM app  
Contact 360° (add-on feature for intuitive, comprehensive contact data views)

## Contact History

A fully integrated contact history enables the user to navigate through the complete communication of the contact.

All inbound and outbound contact dialogs including sales reps visits, complaints, and telephone calls can easily stored and retrieved from the Contact Manager.

This way, the complete sales and service history is available on demand.

## Roles

Klopotek's sophisticated 'role' concept is used to categorize, con-figure, and manage the security and access control of business partners.

Industry standard and your own customized classifications are fully supported by the Contact Manager.

### Functionalities in detail:

- Configurable standard usage of addresses
- Create and edit notes
- Automatically generated and manually edited keywords for an optimized search
- Check if addresses are correct
- Check for duplicates
- Classifications
- Roles
- Identifiers (Orchid ID, Oracle ID, Fieldglass ID, etc.)
- Bank and payment information
- Links
- VAT agents
- And so much more ...

### UI optimization:

- User-specific selection of attributes and information, can be saved as a private or public template – so you only see what you want to see
- Fast page navigation with side-navigation

**CONTACT PROFILE: Ms. Ella Glowczewski**  
Roles: Publisher, Prospect, Author

**Bank Accounts**

BUSINESS UNIT	BANK NAME	ACCOUNT NO	ROLES
Business Unit 1	Berliner Bank	99990-00098623-123	

**Credit Card Details**

Card Nickname	Primary Card	Card Type	Card Number	Expiration Date	Billing Address
Primary Card	<input checked="" type="checkbox"/>	Visa	****-****-7768	May 3, 2018	
Fallback	<input type="checkbox"/>	MasterCard	****-****-8890	May 11, 2018	

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**ROLES**

Role	Business Unit
Publisher	Business Unit 3
Prospect	Business Unit 2
Author	Business Unit 1

**TAXATION**

Sales Tax ID	Enterprise	Tax Exempt
111222314134	Configuration 1	<input type="checkbox"/>