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Contacts Overview

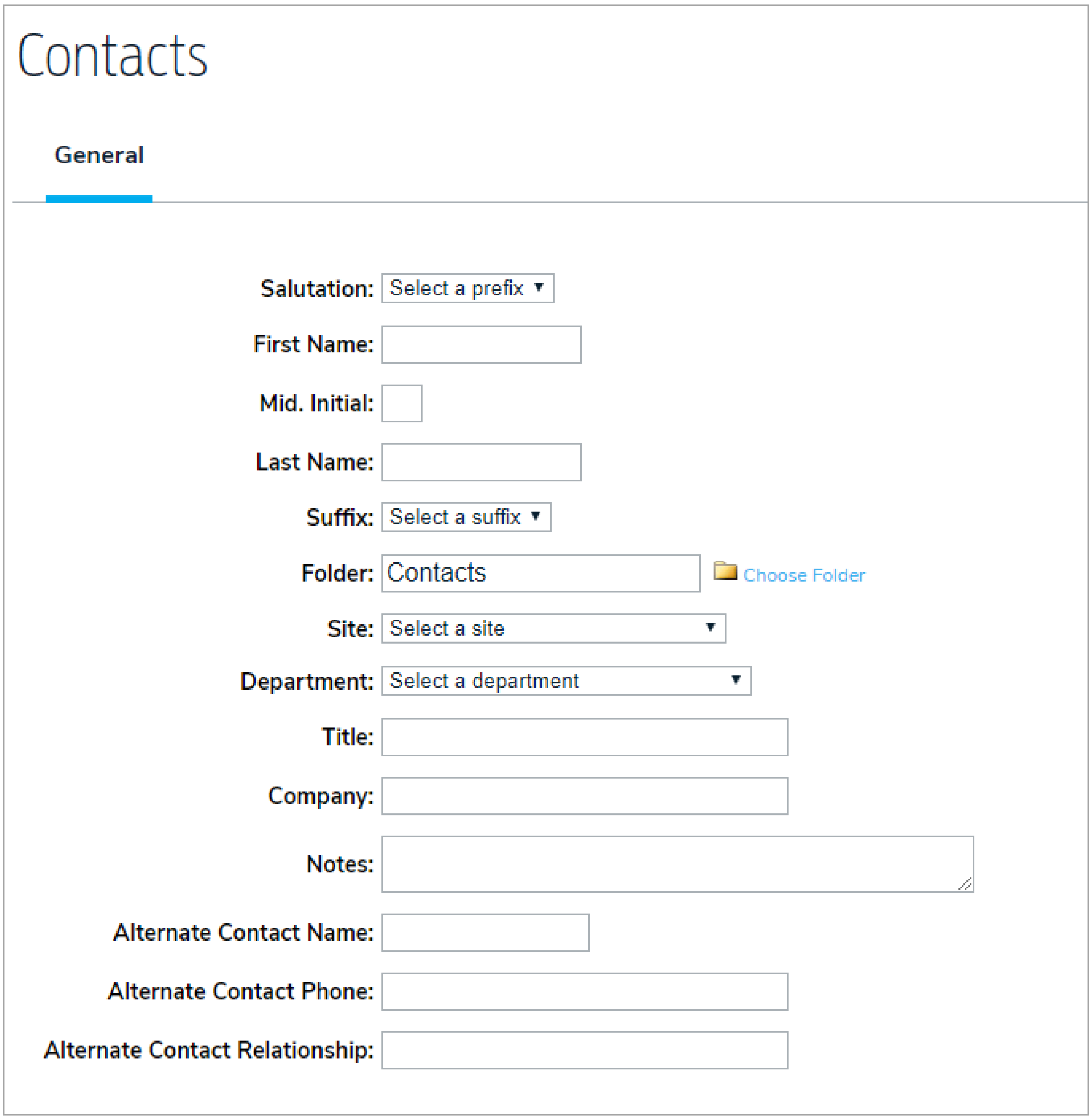
The Contacts feature provides a robust contact management area for each business unit within the system. Both contacts and users are managed from the same location for ease of use. This area also allows you to maintain the contact methods for each contact for broadcast emergency notification.

Create a Contact Record

Once a contact record is created, it can be used to create a new user account. See the Account article for more information on creating a new user from the contact record.

1. To add a new user, click the Contacts icon in the navigation bar.

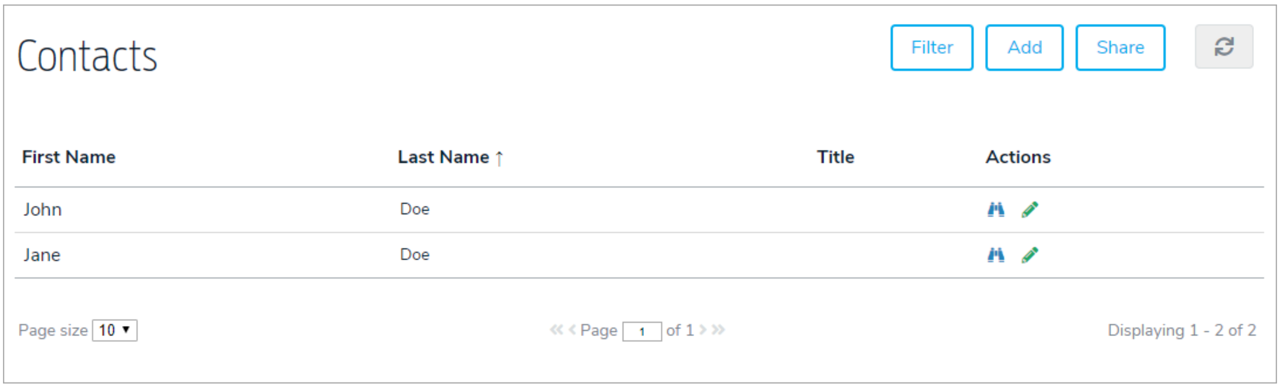
2. Click Add.
3. Enter a first and last name in the First Name and Last Name fields.



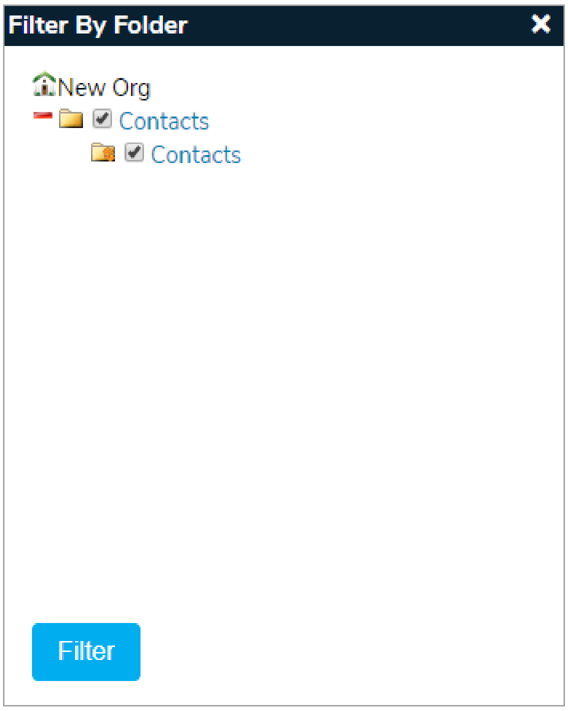
4. Complete any custom fields as needed.
5. Click Add & Continue to save the record and display additional options.

View, Filter & Sort Contacts

To view an existing contact, click the Contacts icon in the navigation bar, then click the in the Actions column. To edit the record, click the icon.



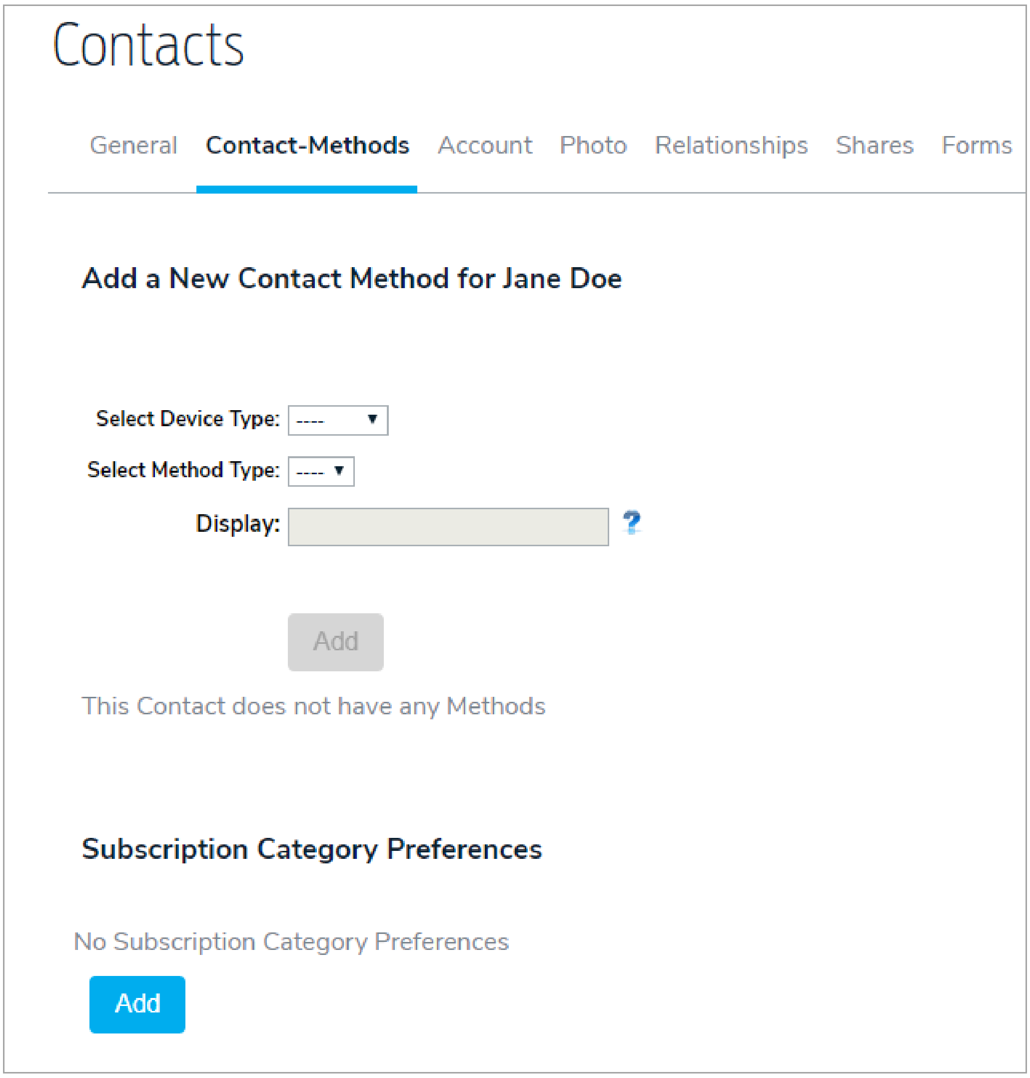
To filter the records by folder, click Filter, then select a folder.



To sort the records, click the First Name, Last Name, or Title headers.

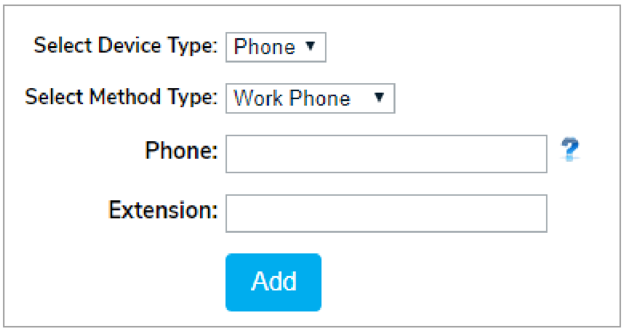
Contact Methods

1. To enter and manage contact methods for a specific record, open the record, then click the Contact-Methods tab.



2. Select a device type, method, then enter the email address, phone number, etc. in the text field. The options available may vary depending on your implementation.

*Note: If you selected the Phone device type, telephone extensions entered in the Extension field are **not** used when this contact method is selected in an ad hoc message or broadcast. This field is used for data collection purposes only. See the Phone Number Validation & Requirements article for more information.*



3. Click Add.

Phone Number Validation & Requirements

During the data import process, GAL validates phone numbers used as a contact method.

If the number starts with 1 and has no plus sign (+), the system assumes it's a domestic number and attempts to validate it as a US number. For example, since a number with 1 with no + would typically represent the US country code, the extra 1 is removed (e.g. 1123456789 would become 123456789). In the case of this particular number, removing the first 1 results in the number being one digit too short for an international number and it fails the first rule (that the first character should be a number 2-9) for a domestic number.

Requirements

If the first character is a 1, do a substring to remove the leading one, then validate as a domestic number (validateDomesticPhoneNumber)

Else If the first character is a +, validate as international (validateInternationalPhoneNumber)

Else Attempt to validate as domestic. If that works stop. If that domestic validation fails, append a + and attempt to validate as international

Domestic:

expects '(' zero or one times

expects the first or second character to be 2-9

expects the following two characters to be 0-9

expects ')' zero or one times

allows any whitespace, period, or hyphen (' ', '.', '-')

expects the following three characters to be 0-9

allows any whitespace, period, or hyphen (' ', '.', '-')

expects the following four characters to be 0-9

allow 0-9 between 1-200 times

ex: (234)-333-5555, 5555555555, 555.555.555, 555 555 555, 1(555 555.5555 are all valid numbers in a data feed for contact methods.

International:

expects '+'

expects the first character to be 1-9

expects the following n characters to be 0-9

allows '('

expects the following n characters to be 0-9

allows ')'

allows '-'

expects the following n characters to be 0-9

allows '-'

expects the following n characters to be 0-9

allows .

expects the following n characters to be 0-9

allows .

allows any whitespace character

expects the following n characters to be 0-9

allows any whitespace character

allow 0

allow 1-9 followed by any number 0-9 or \ or -

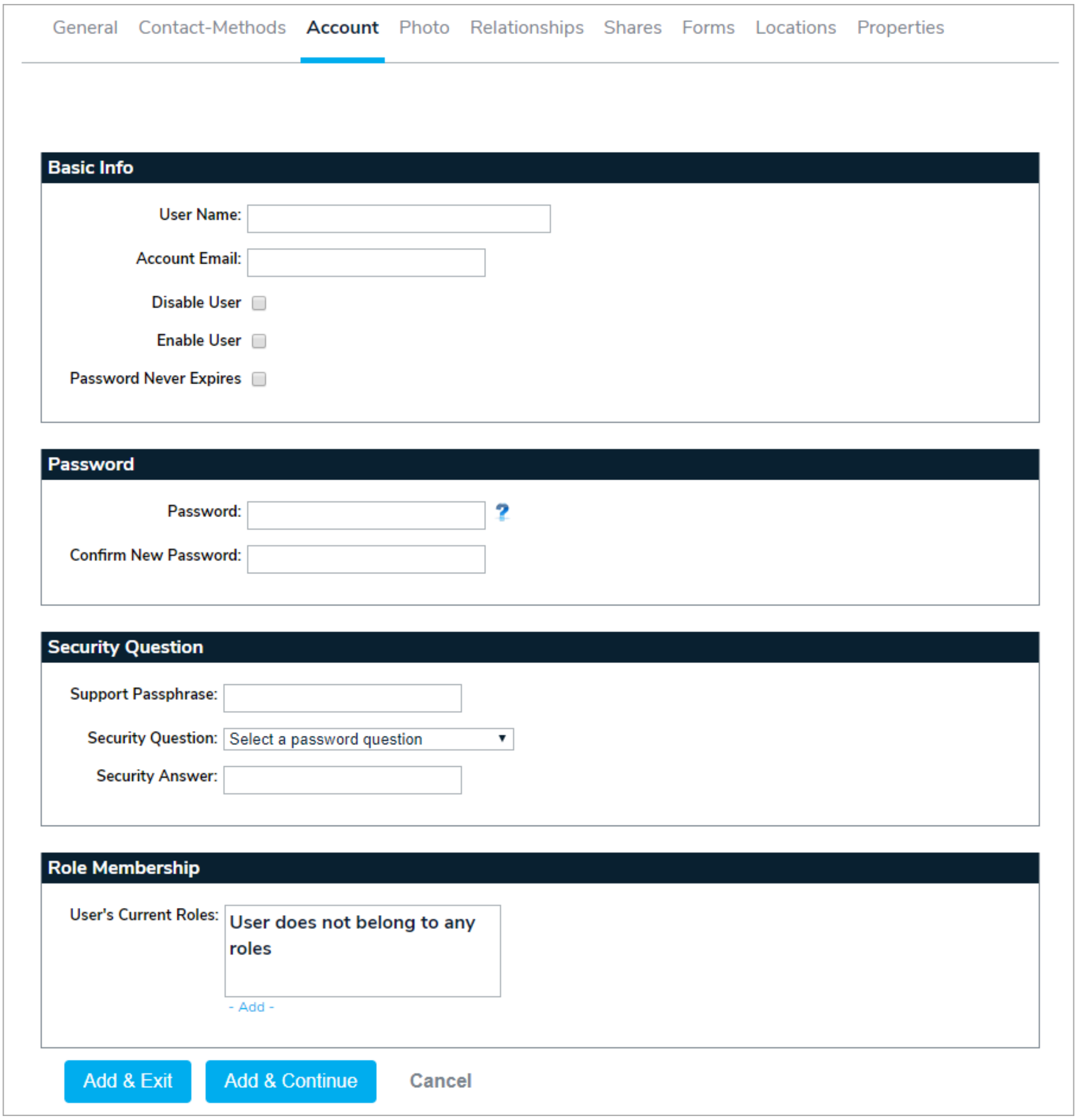
allow 0-9 between 1-200 times

Note: International numbers vary greatly in length and format. The standard format is a maximum length of 15 characters. International phone number validation is difficult. Please consult various reference documents that are available to determine the correct format for your land line, mobile phone and SMS device. If you have any questions, contact support@resolver.com for assistance.

Contact Account

User accounts in Global AlertLink are created in the Account section of a contact record's settings.

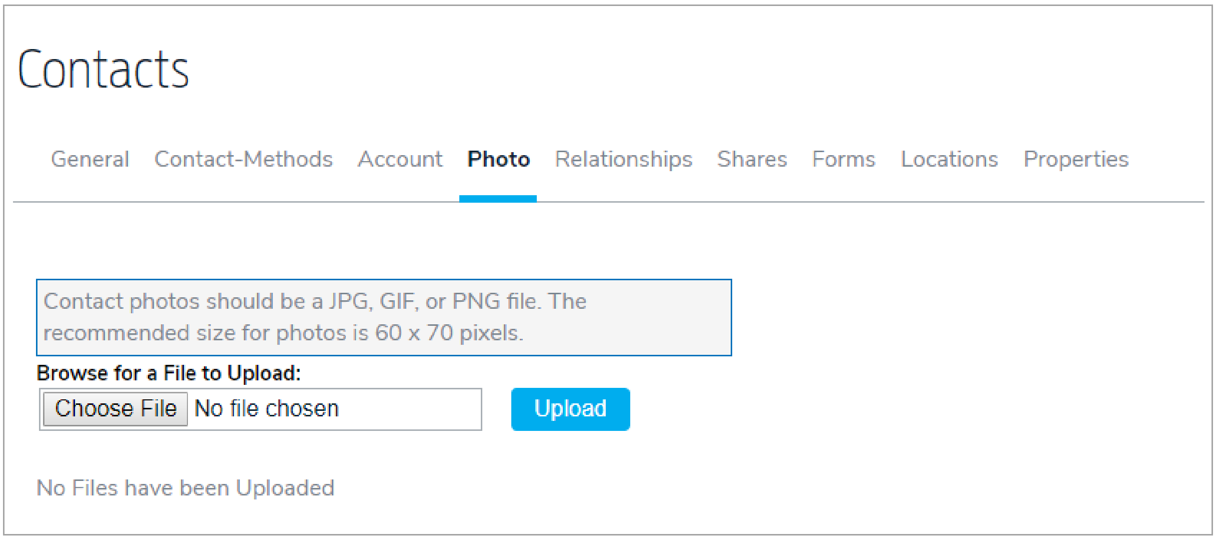
1. To create a user account, open the Contact record.
2. Click the Account tab.



3. Enter a user name and account email.
4. Select the Enable User or Password Never Expires checkboxes as required.
5. Create a password and security question for the account.
6. Add the user to one or more roles to determine the permissions and privileges available to the user.
7. Click Add & Exit or Add & Continue.

Contact Photo

1. To upload an image for the contact, open the contact record.
2. Click the Photo tab.



3. Click Choose File.
4. Locate the photo on your local computer or network drives.
5. Select the file, then click Open.
6. Click Upload to save the photo the record.

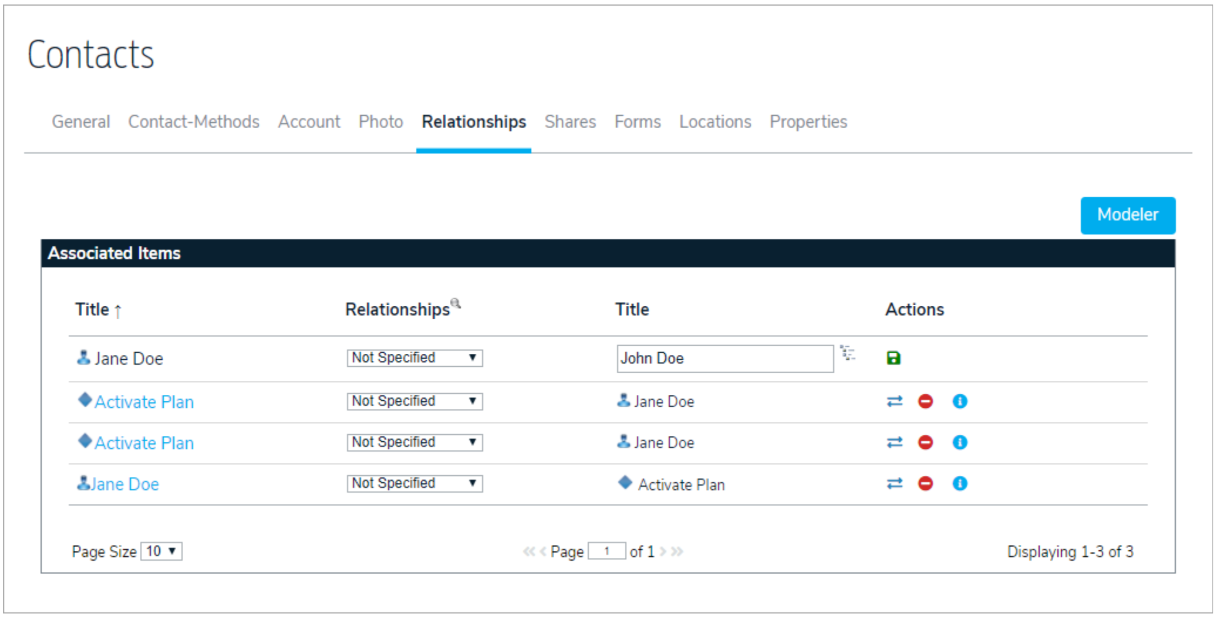
Contact Relationships

You can create relationships between items and any record type (except for News & Updates) through the **Relationships** tab of that record.

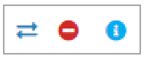
For more relationship features, see the Relationship Mapping tool in Administration, the Relationship Editor form type, or the relationship builder tool on custom forms.

To add a relationship from the Relationships tab of a record:

1. Navigate to the applicable organization and open the record.
2. Click the **Relationships** tab.
3. Select a relationship type from the dropdown menu in the **Relationships** column. Relationship types are configured in the Referential Data settings.
4. Click the textbox on the left of the top row and enter keywords to search for and select an object or click the  icon to the right of the text field to display the **Association Tree**, then select an object.

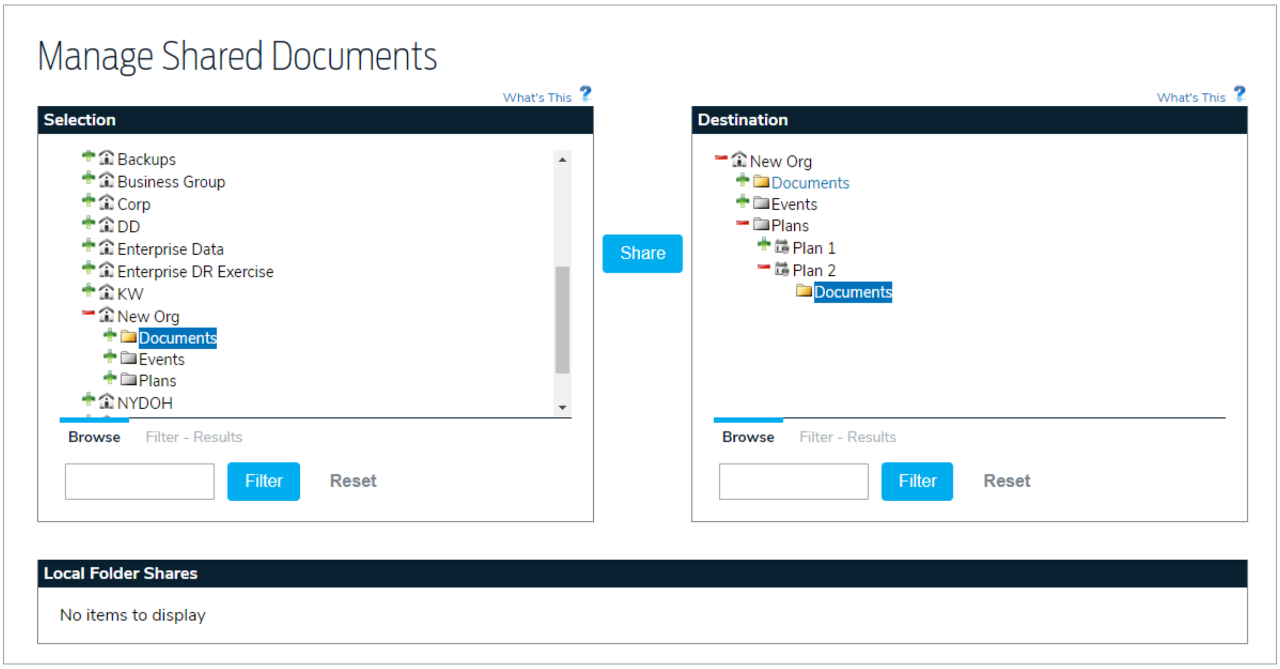


A new relationship in the relationships tab of an object.

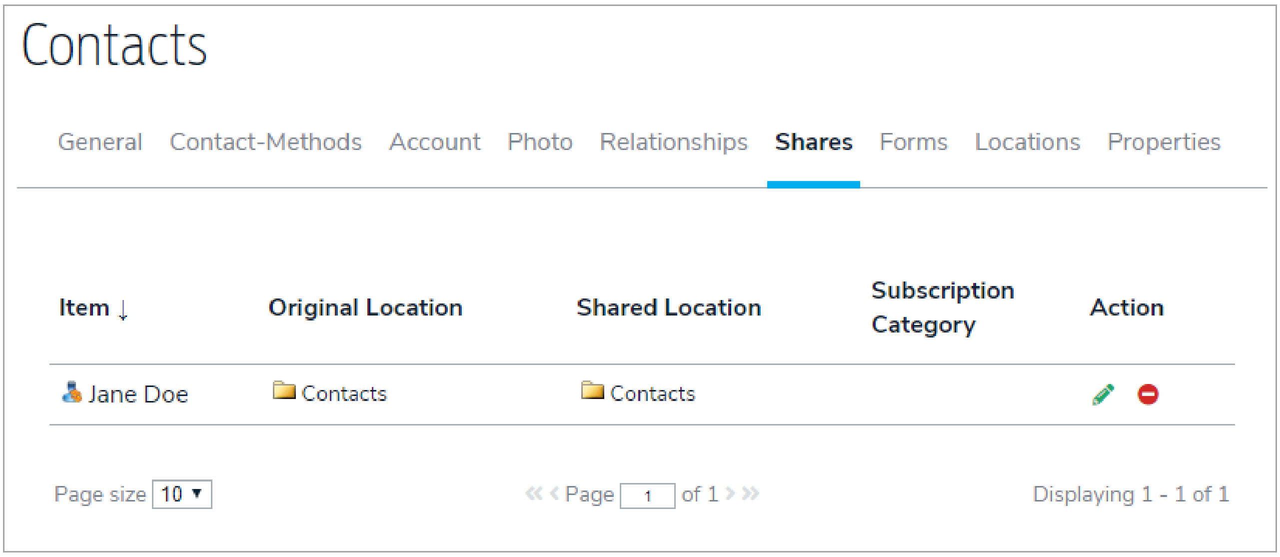
5. Click the  icon to save the relationship.
6. Click the  icons to swap the objects in the relationship, delete the relationship, or view more information.

Contact Shares

Contacts, Documents, Resources, and Forms can be shared across business units. By sharing, you are creating a link to the original source record. This does not duplicate the record, so any changes made will impact all shares. To share a contact record, click the appropriate icon in the navigation bar, then click Share to select which record will be shared and its destination.



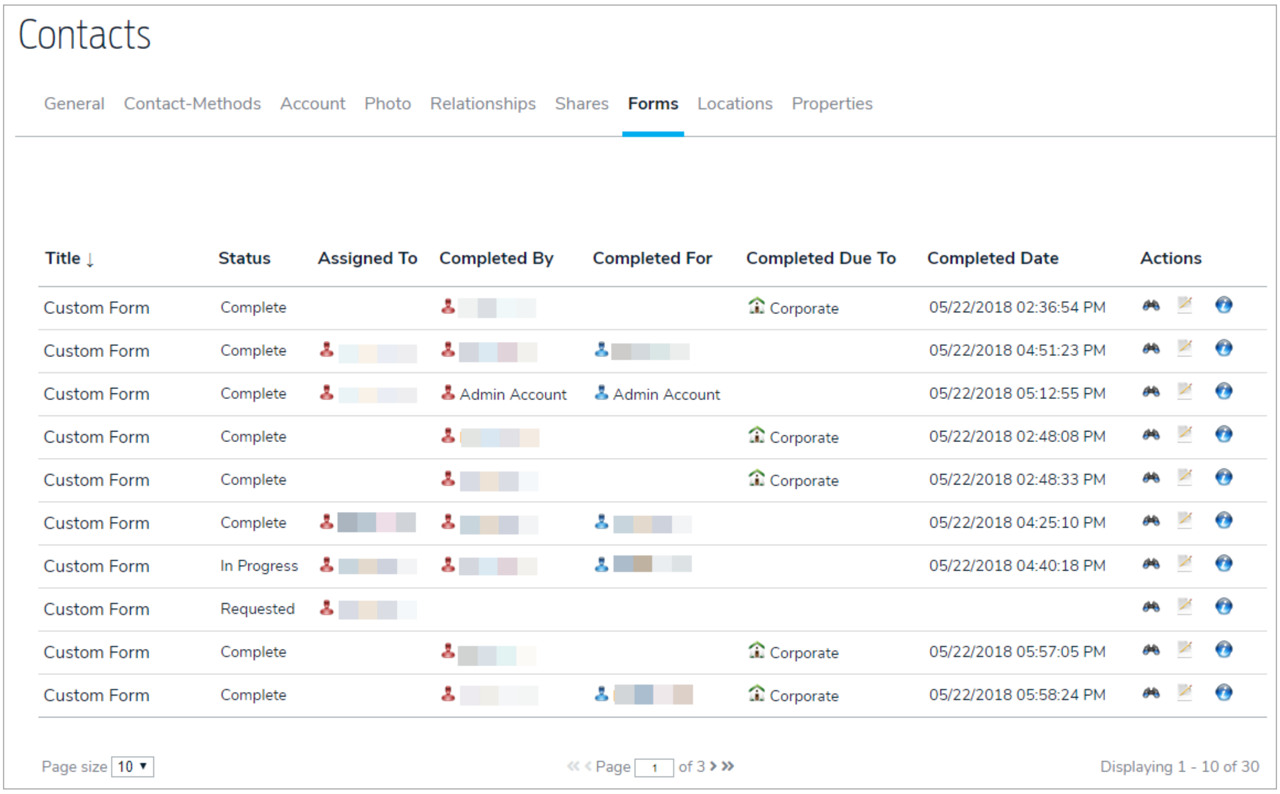
To view where the record is shared, as well as the subscription categories the record is subscribed to, if any, for each folder, click the Shares tab in the record. Click the pencil icon to edit the share or the delete icon to remove it.



Contact Forms

To view the forms a user has completed, started, or is requested to complete, click the Contacts icon in the navigation bar, then click the Forms tab.

From the Actions column of this page, you can view or edit the form or display additional information about the form.



Contacts

General Contact-Methods Account Photo Relationships Shares **Forms** Locations Properties

Title ↓	Status	Assigned To	Completed By	Completed For	Completed Due To	Completed Date	Actions
Custom Form	Complete				Corporate	05/22/2018 02:36:54 PM	
Custom Form	Complete					05/22/2018 04:51:23 PM	
Custom Form	Complete		Admin Account	Admin Account		05/22/2018 05:12:55 PM	
Custom Form	Complete				Corporate	05/22/2018 02:48:08 PM	
Custom Form	Complete				Corporate	05/22/2018 02:48:33 PM	
Custom Form	Complete					05/22/2018 04:25:10 PM	
Custom Form	In Progress					05/22/2018 04:40:18 PM	
Custom Form	Requested						
Custom Form	Complete				Corporate	05/22/2018 05:57:05 PM	
Custom Form	Complete				Corporate	05/22/2018 05:58:24 PM	

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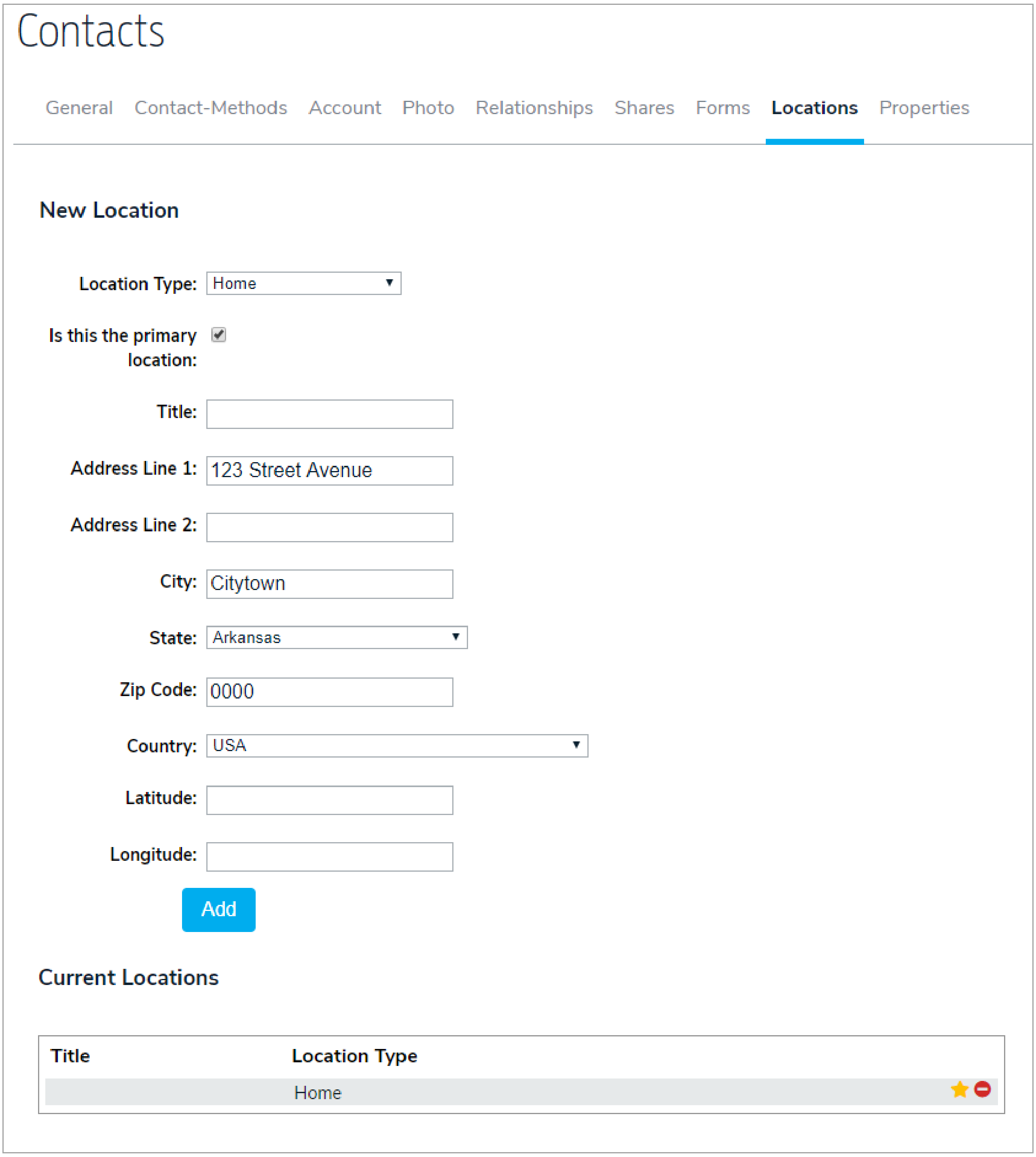
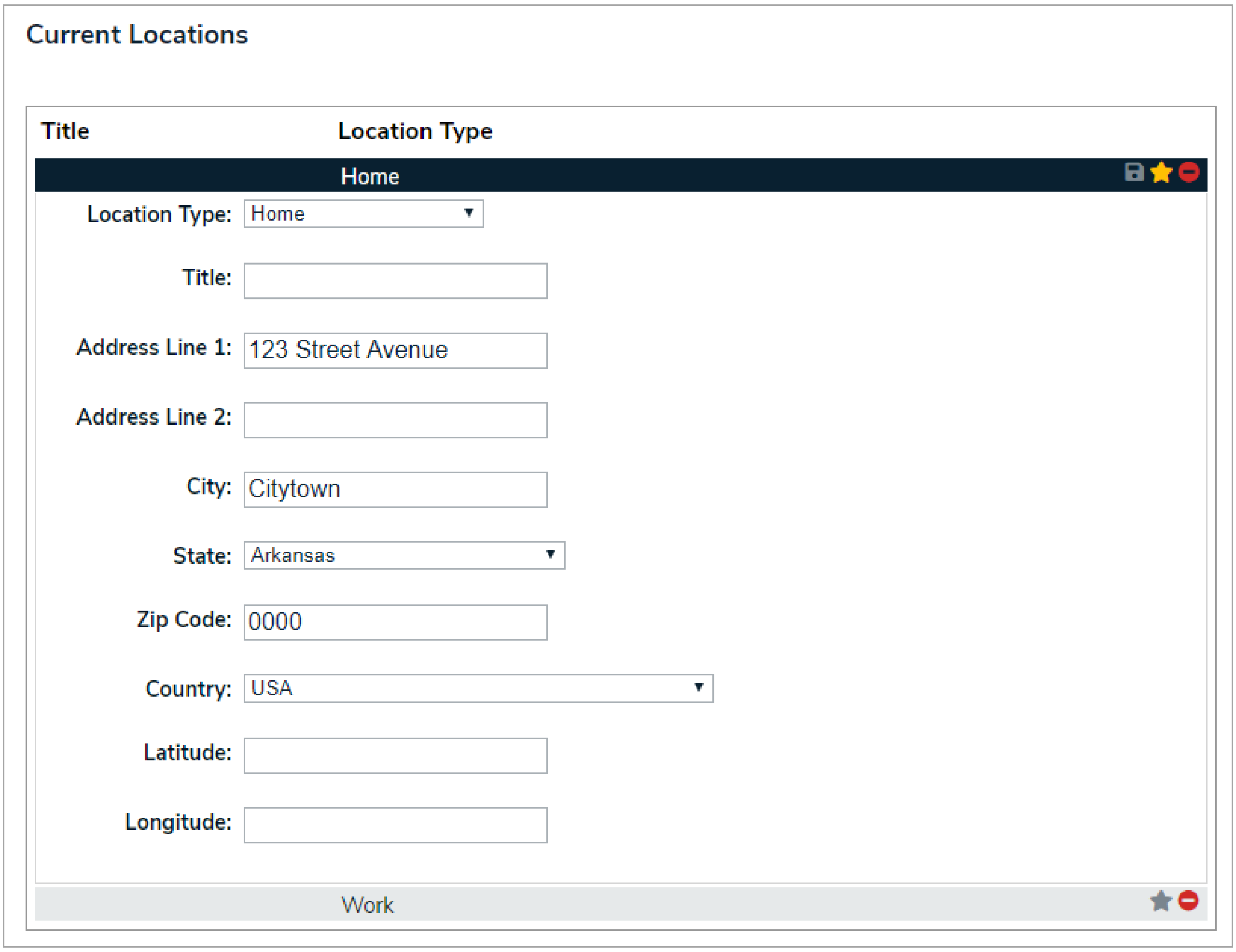
Contact Locations

The Locations tab of a contact record allows you to add one or more location entries for the user (e.g. Home Work). The location types are created and managed in the Referential Data settings.

Note: The data entered in the Latitude and Longitude fields are used in the the GIS Mapping Services.



To edit an existing location, click it in the Current Locations section. To mark the location as the primary, click the star icon.



Notes About the Country Field

The Country field for the contact's primary location is required to route international SMS messages. A location entry must be specified that corresponds to the contact's SMS device address, i.e. +56XXXXXXXXX is a mobile device address for Argentina and if you want to send SMS to this device you must specify a location record with a country = Argentina.

However, some international phone formats do not use country code, e.g. Canada, the Caribbean, U.S. Pacific Countries and Bermuda. Contacts that are in these countries also require a location record with the proper country in order to properly route SMS messages.

However, for international phone calls, if the country field is left blank, we will use the country code identifier in the contact method for the phone device type, i.e. +56XXXXXXXXXX will be recognized as a phone number in Argentina and an international call will be placed.

It is our recommendation that if you have contacts that are in other countries, you always create a location record with the proper country specified.

Contact Properties

The Properties tab of a record allows you to select an account or role as an owner of the record, review system information, schedule reviews, view existing schedules, pending reviews, and the record's history.