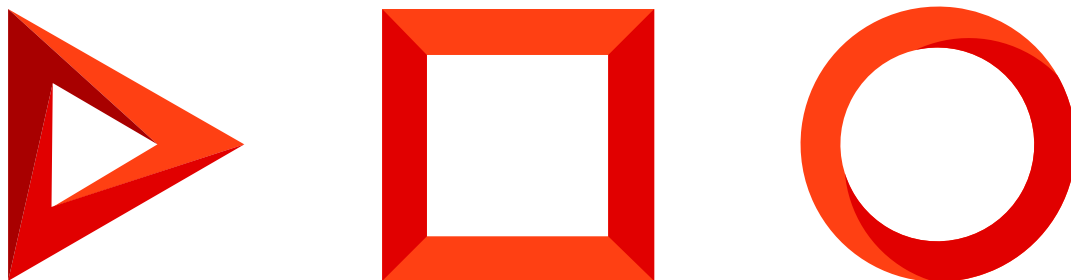


Communication options and addresses

Manage communication options and addresses

Version 8.0



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Manage communication options and addresses

PRODUCTS: **ALL CREATIO PRODUCTS**

In Creatio, you can manage the communication options and addresses of contacts and accounts using the [*General information*] tab on their pages. Add addresses and communication options, look them up on a map, and restrict the usage of specific communication options.

Add a communication option

Use the [*Communication options*] detail to specify the communication options of a contact or account. To do this:

1. Go to the [*Contacts*] or [*Accounts*] section and open the needed record.
2. Click [*General information*] → [*Operations*] → +.
3. Select communication option to add:
 - [*Business phone*], [*Mobile phone*], [*Home phone*]. Phone numbers that can be used to contact the person. Communication option types are defined when a record is added. You can change the options later. The fields are available for contact profiles.
 - [*Primary phone*], [*Alternate phone*], [*Fax*]. Phone numbers that can be used to contact the company. Communication option types are defined when a record is added. You can change the options later. The fields are available for account profiles.
 - [*Web*], [*Email*]. Website and email addresses of the contact. The record list displays the last of the entered email addresses of the contact or account.
 - [*Facebook*], [*Twitter*]. Social network profiles of the contact or account. A separate page is used to link social network profiles to accounts or contacts.
 - [*Skype*]. The contact's Skype account. The field is available for contact profiles.
4. Enter the data using the standard format for this communication option.
5. Click [*Save*].

You can use default types of communication options or add custom ones. Use the [*Communication option types*] lookup to add custom types of communication options. Custom communication option types fall into one of the pre-set communication types, such as Email, Phone, Skype, SMS, Social network, or Web. Be sure to select one when adding a custom communication option type.

Attention. If the Microsoft Exchange integration is configured, it is not recommended to change default communication option types, since this may lead to [synchronization](#) errors.

Restrict the usage of a contact's communication options

If a contact prefers some communication options and finds the usage of the other options unacceptable, you can display this information on the [*Communication options*] detail. To do this, click + → [*Do not use*] → select the needed option.

- [*Do not use email*]
- [*Do not use phone*]
- [*Do not use SMS*]
- [*Do not use mail*]
- [*Do not use fax*]

Checkboxes signify which communication options cannot be used to contact the person. For example, if a contact does not wish to receive mails, select the [*Do not use mail*] checkbox. For example, if a contact did not consent to receive emails, select the [*Do not use Email*] checkbox.

If the “Unsubscribe user from all bulk emails” system setting is enabled, the [*Do not use email*] option box will be automatically checked for all contacts who unsubscribed from bulk emails. This functionality is available in Sales Creatio and Marketing Creatio.

When sending bulk emails via the [*Send email*] element in the business process or case, Creatio ignores the [*Do not use email*] checkbox selected in the [*Communication options*] detail.

You can also tag a communication option as invalid. This functionality is available in Marketing Creatio:

- [*Invalid*]. If a communication option is currently not used, it becomes invalid. The “invalid” status appears automatically when the [*Valid*] option is not checked for the selected communication option. It is not displayed on the [*Communication options*] detail but can be used when setting up filters for folders.
- [*Reason for irrelevance*]. The reason why the selected communication option is invalid: “Hard bounce” or “Manual setting.” The field is populated automatically. It is not displayed on the [*Communication options*] detail but can be used when setting up filters for folders.
- [*Invalid from*]. Date from which the selected communication option becomes invalid. The field is populated automatically. It is not displayed on the [*Communication options*] detail but can be used when setting up filters for folders.

Add address

Use the [*Addresses*] detail to specify the addresses of a contact or account. To do this:

1. Go to the [*Contacts*] or [*Accounts*] section and open the needed record.
2. Click [*General information*] → [*Addresses*] → +.
3. Select the type of address to add.
4. Fill out the following fields on the page that opens:
 - [*Address type*]. Type of address of the contact or account. For example, “Home” or “Work” for a contact, “Legal” or “Actual” for an account. Address types are defined when a record is added. You can change the types later.
 - [*Primary*]. Indicates the primary address. Select this checkbox to display this address in the contact or account profile. By default, the [*Primary*] checkbox is selected for the first address added to the

[*Addresses*] detail, but you can select this checkbox for a different address at any time. The checkbox in the original record will be cleared.

- [*Address*]. Street, building, and apartment or office number. The list displays the account or contact's primary address.
- [*City*], [*Country*]. The location of the contact or account. The [*State/province*] and [*City*] fields are connected to the [*Country*] field. For example, the [*Country*] field will be populated automatically when you populate the [*City*] field. Similarly, if you enter a province in the [*State/province*], the [*Country*] field will be populated automatically. When you fill out the [*Country*] field, the [*State/province*] and [*City*] fields will display only those regions and cities, which correspond to the selected country. You can associate a region with a certain country in the [*States/provinces*] lookup, and associate a city with a country in the [*Cities*] lookup.
- [*ZIP*]. ZIP or postal code of the account or contact.

After populating one or several addresses, the [*Show on map*] section action becomes available. Use it to display the location of the selected accounts on the map. If an account has several addresses populated, e. g., physical address and delivery address, the map displays all of the specified addresses. To view the detailed description, click one of the addresses.

The address of an account also displays after clicking on the needed entry in the [*Addresses*] detail. If the location of the account on the map is not correct, move the marker to the correct position and save the changes.

Attention. Creatio displays addresses using the OpenStreetMap service integration. The service is developed and maintained by a third party. Creatio assumes no responsibility for the operation of the service and the content of OpenStreetMap maps.