

MatterSphere V7.2

Linking Contacts

Contacts can have links created to one another for example a husband and wife will have separate Contact Records but if one of them is selected to become a new client or you are creating a new matter then MatterSphere will prompt you that there is a linked contact and you will be able to select them to include as a secondary client.

Alternatively, you can link an Individual Contact to an Organisation as for example an Employee. There are multiple options available.

Create a Link

Select the Contact you want to link to another contact.

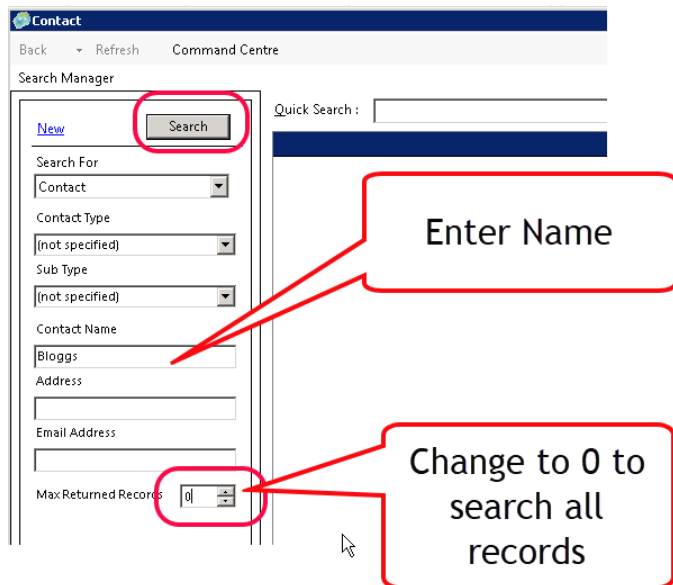
☞ Click on **Contact Manager**



☞ Enter the Contacts details

☞ Mark to 0 to search all Records

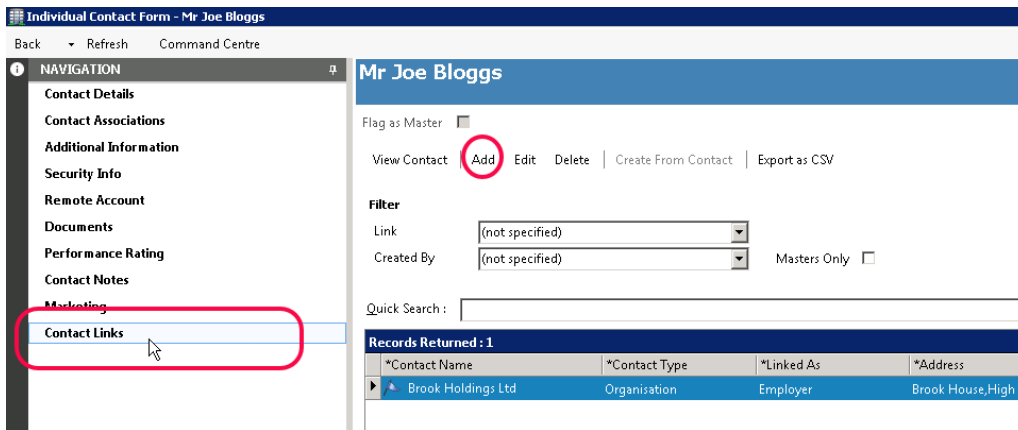
☞ Click on **Search**



☞ Double click on the correct entry returned to access the Contact Record

Records Returned : 1			
*Contact Name	*Type	*Address	Approved
Mr Joe Bloggs	Individual	6 The High Street,Huddersfield	Yes

☞ Select the **Contact Link Tab** (our Contact has already got a contact link but we can add more)



Individual Contact Form - Mr Joe Bloggs

Back Refresh Command Centre

Mr Joe Bloggs

Flag as Master

View Contact **Add** Edit Delete Create From Contact Export as CSV

Filter

Link (not specified)

Created By (not specified) Masters Only

Quick Search:

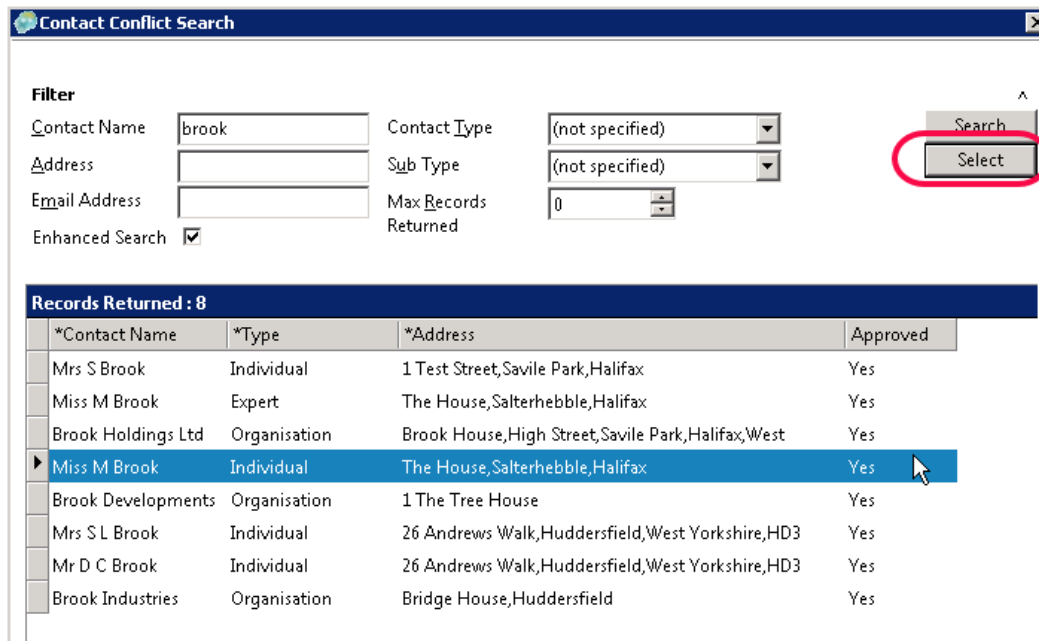
Records Returned : 1

*Contact Name	*Contact Type	*Linked As	*Address
Brook Holdings Ltd	Organisation	Employer	Brook House,High

☞ Click on **Add**

☞ Add all the search details for the Individual or Organisation you wish to link to.

☞ When found and selected click **Select**



Contact Conflict Search

Filter

Contact Name brook Contact Type (not specified)

Address Sub Type (not specified)

Email Address Max Records 0

Enhanced Search Returned

Search

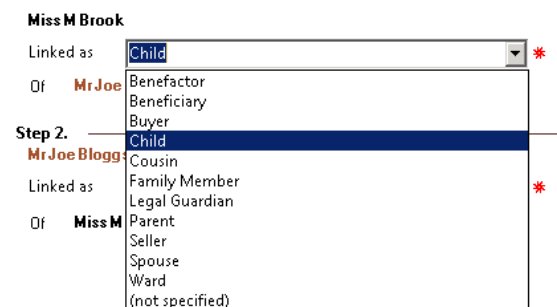
Select

Records Returned : 8

*Contact Name	*Type	*Address	Approved
Mrs S Brook	Individual	1 Test Street,Savile Park,Halifax	Yes
Miss M Brook	Expert	The House,Salterhebble,Halifax	Yes
Brook Holdings Ltd	Organisation	Brook House,High Street,Savile Park,Halifax,West	Yes
Miss M Brook	Individual	The House,Salterhebble,Halifax	Yes
Brook Developments	Organisation	1 The Tree House	Yes
Mrs S L Brook	Individual	26 Andrews Walk,Huddersfield,West Yorkshire,HD3	Yes
Mr D C Brook	Individual	26 Andrews Walk,Huddersfield,West Yorkshire,HD3	Yes
Brook Industries	Organisation	Bridge House,Huddersfield	Yes

☞ Select how the two contacts are linked

☞ Select from the drop down list



Miss M Brook

Linked as Child *

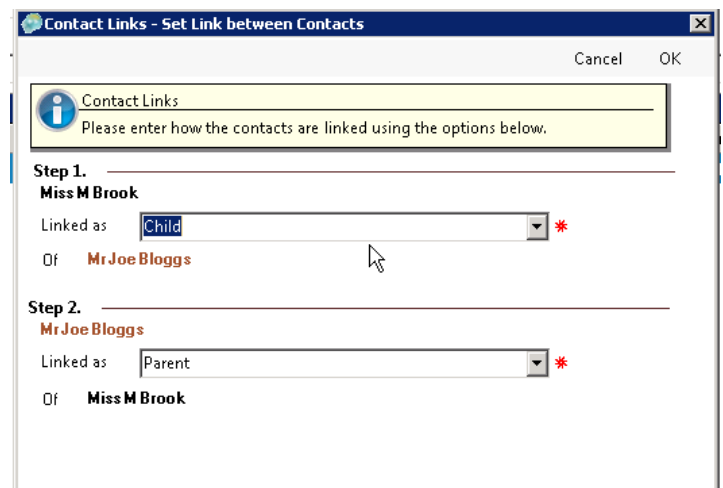
Of Mr Joe Bloggs

Step 2.

Mr Joe Bloggs

Linked as Child *

Of Miss M Brook



Contact Links - Set Link between Contacts

Cancel OK

Contact Links

Please enter how the contacts are linked using the options below.

Step 1.

Miss M Brook

Linked as Child *

Of Mr Joe Bloggs

Step 2.

Mr Joe Bloggs

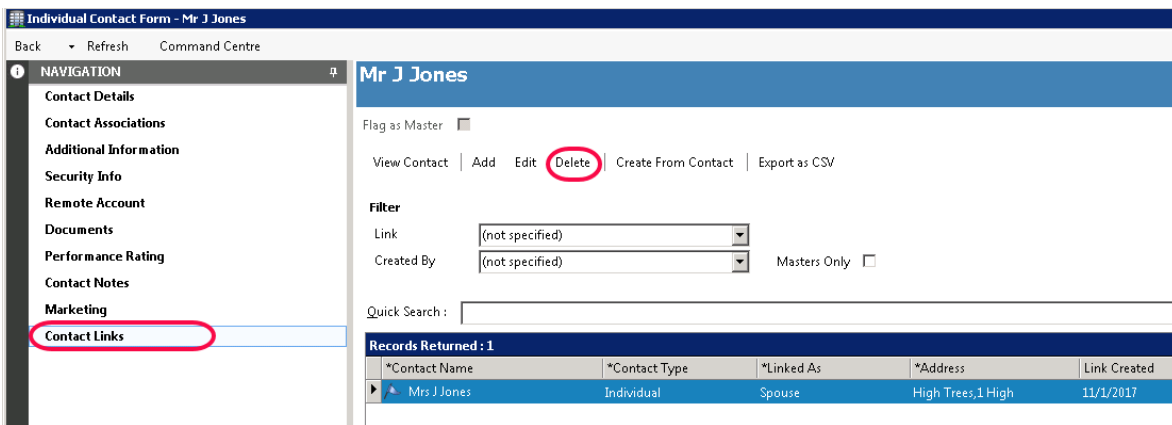
Linked as Parent *

Of Miss M Brook

Remove a Link

Links can also be removed from contacts to enable quality records to be maintained.

- ☞ Select the required Contact
- ☞ Click on the **Contact Links Tab**
- ☞ Select the Contact Link
- ☞ Click **Delete**



Individual Contact Form - Mr J Jones

Back Refresh Command Centre

Mr J Jones

Flag as Master

View Contact | Add | Edit | **Delete** | Create From Contact | Export as CSV

Filter

Link: (not specified)

Created By: (not specified) Masters Only

Quick Search: _____

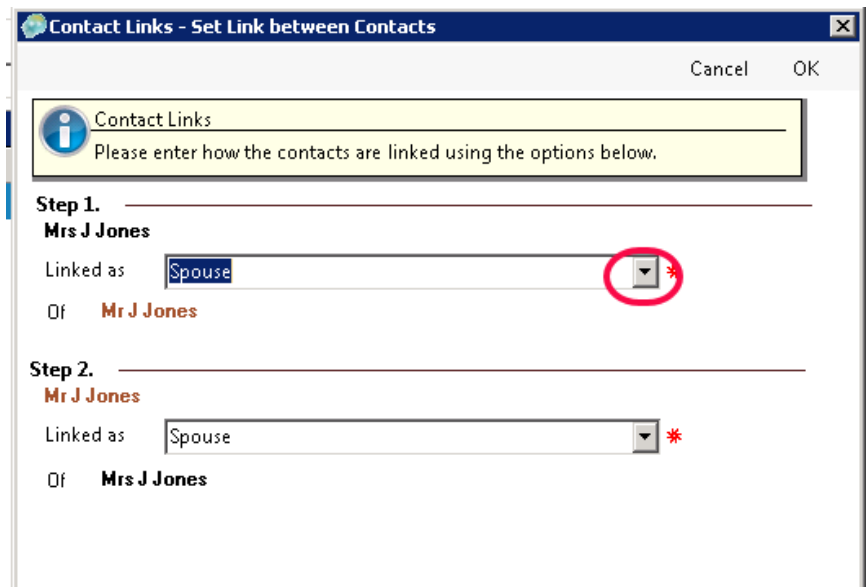
Records Returned : 1

*Contact Name	*Contact Type	*Linked As	*Address	Link Created
Mrs J Jones	Individual	Spouse	High Trees,1 High	11/1/2017

Edit a Link

Links can be edited to change the Link type

- ☞ Select as above
- ☞ Click **Edit**
- ☞ Select the *Linked as type* from the drop down list
- ☞ Click **OK** to finish



Contact Links - Set Link between Contacts

Cancel OK

Contact Links

Please enter how the contacts are linked using the options below.

Step 1.

Mrs J Jones

Linked as: Spouse

Of **Mr J Jones**

Step 2.

Mr J Jones

Linked as: Spouse *

Of **Mrs J Jones**