healthwatch

Using contacts

Using the Healthwatch CiviCRM

About this resource

The CiviCRM is focused on contacts being the key part of the system. All other parts of the system, such as relationships, notes, groups, mailings, events and reporting are based around the contacts you have in your CRM.

This resource is for anyone using the CiviCRM and explains what contacts are and how to add, edit and delete a contact.

About contacts

Your CiviCRM provides you with a useful way of managing your contacts. It allows you to:

- Record the latest communications
- Group, tag and create connections between individual contacts and organisations
- Create mailing lists
- Report on activities with your contacts.

Types of contact

There are three broad types of contact you can record.

- Individuals
- Organisations
- Households - *Households are a family or group of people who share a physical location and is a contact type rarely used by Healthwatch.*

You can create contact sub-types: for example, you could have several different types of Individual contacts, such as Volunteer, Staff Member and Trustee.

If you need to add a contact sub-type that is not already on the system, you will need someone with administrator permissions to add this to your CRM.

Each contact record holds information including (but not limited to):

- Name, nickname, greeting, title
- Website, email addresses, phone numbers, social media account handles
- Addresses
- Communication preferences (how they prefer to be contacted and which methods they do not want to be contacted by)

Creating new contacts

To create a new contact, go to 'Contacts' in the menu, and then New Individual or Organisation, depending on the contact you want to add. A contact cannot be both an individual and an organisation.
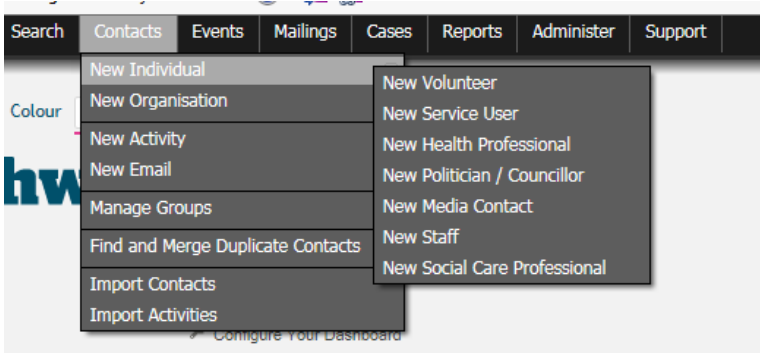
After selecting your contact type, the following page will appear.

This is slightly different for organisations, with a few different fields. None of the fields are compulsory, so if you do not have all the information required then do not worry.

As you start to fill in the information, you will see that a list of possible matches comes up on the right-hand side of the screen: you can use it to ensure that you are not creating a duplicate contact.
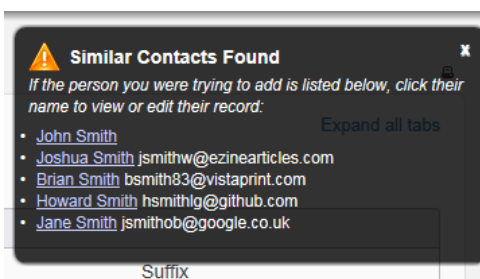
You can add more than one email address, phone number and address.

If you add the address then the CRM will automatically map the contact using Google maps and you can then map all your contacts to see where they are located.

Further down the page is 'Communication Preferences'. This is an important field as if a contact has asked you not to email them then you can tick 'do not email' and the CRM will not let you email them through it.

It is also a good reminder if you're looking up an individual's details and see that they prefer to be contacted by telephone than letter.

If you send out your newsletter via email on the CRM and a contact chooses to opt out, this will automatically be recorded on the CRM and the contact blocked from your mailings.

When you have completed the contact information, click 'Save' at the bottom, or if you want to add another contact click Save and New. When you have saved your contact, they will appear in a contact record with all their information on, and you are also able to see from the contact record whether they have any activities stored against them, or whether they are in any groups, among other functions.

When you create a contact, you will notice that they are automatically assigned a CiviCRM ID; the External ID field is there in case you have a reference number relating to them from your records before you began using the CRM.

Editing a contact

If you want to edit a contact, you need to bring up the contact summary as above, and then simply click on 'Edit' at the top: this will allow you to edit any part of the contact summary.

You can also add or edit sections at a time simply by hovering over the relevant section.

Deleting a contact

You can delete a contact simply by clicking on 'Delete Contact'. However, you should be sure that you do want to delete the contact as you will lose all records relating to them as well.

Try it for yourself

- Create a new organisation in your system, filling in as much information as you want – remember that you can only get out as much as you put in

- Create a new individual in your system, filling in as much information as you want

- Edit your new individual – they have got a second email address