

DevMan allows you to create links between Organisations and People and with projects, approaches, interactions and other DevMan functions. This gives you a three dimensional view of all relationships, i.e. view all the people linked to a specific Organisation or all the Organisations a person is linked to.



Add a new organisation & person on one page

Before adding new data, it is necessary to use the Search features to search for an existing profile. If you find a match **DO NOT** create a new profile. If you don't get a match, create a new profile.

From the main menu select :

Organisation



Add new
Organisation

This method allows you to add the details of a new Organisation and the contact person on one page, but creates two separate profiles that are linked:

- one for the organisation
- one for the person

Thereafter, each profile must be updated individually. Complete all details and save.

Add a new person & link to existing organisation

From the main menu select :

People



Add new
Person

This method allows you to add a persons profile, and link them to an Organisation, without having to add all the Organisations details because the Organisation profile already exists on the database.

Link the person to the Organisation profile by using the inline search feature in the Organisation field. Complete all details and save.

To view an organisation or person profile

SIMPLE SEARCH

Use the inline search feature on one of the following pages:

Home tab: Searches **ALL** profiles - People, Organisations & other

People tab: Searches People only

Organisation tab: Searches Organisations only

FILTERED SEARCH

Select either:

People OR
Organisation



Search

- Use the various filters to narrow your search
- Select Search to execute the search
- Click on row to see the details

To edit a profile

When on the profile select:

Edit

Edit the details and Save your changes.

View, edit & add a link between organisation & people

The link defines the relationship between an Organisation and a person. At the bottom of the organisation or person summary page you will see all links for that particular profile. To view, add or edit links of a particular profile select:

View / Add



Links



Person /
Organisation

- Click on a row in the grid to view or edit details
- For new links complete details using inline search and save.

Telephone numbers

DevMan automatically validates and formats phone numbers based on the requirements for each country (as defined internationally). This ensures that all phone numbers are validated and correctly formatted when sending SMSes so they do not fail. For example: US phone numbers get dashes, UK numbers get spaces, etc.

Local numbers are saved in the format in which you would dial them automatically removing the prefixed country code. Should you prefer to have local numbers saved in the international format please contact support to enable.

Add banking details

Banking details can be added to a person or an organisation profile. Bank account details are needed for any EFT integration giving or payment. From the profile select:

View



Financials



Bank account

This will show you a grid of any captured bank accounts. To add an account select:

Add

Capture the bank account details then select Save and close.

The bank account grid will encrypt the account number, the only way to view the details is to go into the record. To view or edit the details or view the bank account as above, select the account from the grid, edit and save.

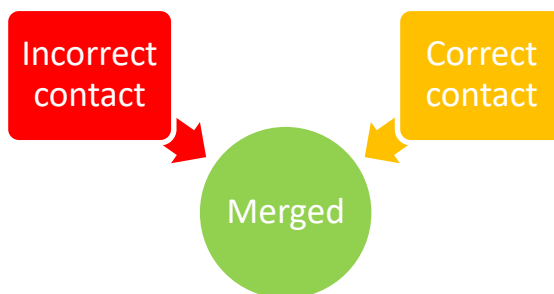
Bank accounts linked to any successful completed transactions will be locked.

Notes

Contacts Merge

HOW IT WORKS

DevMan allows you to merge duplicated profiles of organisations and people into one profile, combining their history, contact details, interactions, activities, projects and financial data onto one profile.



Merge profiles

Only duplicated Organisation or People profiles can be merged.

When duplicated profiles have been identified, select the profile with the least up to date information and select:

Maintenance



Merge

This will take you to the re-allocate page. Carefully read the information in blue, indicating what data will be re-allocated.

Further down the screen you will see:

Obsolete contact

ABC Charity Foundation

Correct contact (**)

ABC Charity Fair Foundation

** Use the inline search feature to select the correct contact profile.

The grid below will show you the data that will be replaced:

Comparison	Data	Detail	Obsolete info	Correct info
Contact name			ABC Charity Foundation	ABC Charity Fair Foundation
Primary link	Name		Nkosi, Thandeka	Adege, Musa
Contact details	Cell number		082 555 5555	082 444 4444

To merge the data select:

Merge

Once the reallocation of data is successful, go back to the incorrect profile and delete it from the database