

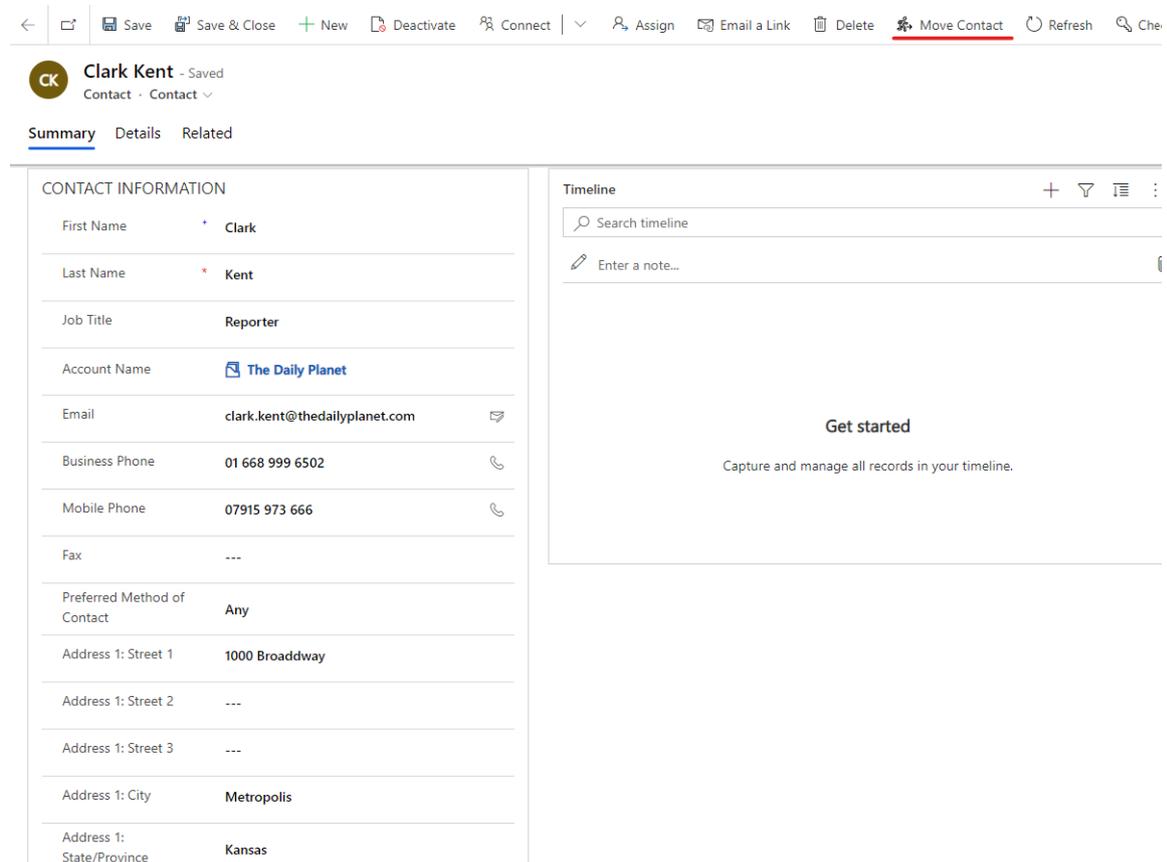
Move contact feature

Within the construction industry, or any industry to be fair, it is a common occurrence for a contact to move from one company to another. As Dynamics 365 is all about maintaining the relationships you have built up over time with both companies and contacts, you will want to keep the information you have stored against that contact, the jobs and projects they may have worked on. But you will also want to link them to the new company they now work for. The key presses you would need to do in Dynamics 365 to achieve this would be: -

1. Create the new contact.
2. Link the contact to the new company they work for.
3. On the new contact record create a connection to the old contact with the role of something like 'Same Person'.
4. On the new contact record create a connection to the old company the contact worked for with role like 'Former Employer'.
5. Deactivate the old contact record.

Due to the effort involved KMS have automated this by creating a custom control with an action process.

KMS have added a new button on the contact form called 'Move Contact' which will do the above five items. The Dynamics 365 user will need to search for the new company (which is a lookup), populate the new job title, the new email and the new mobile number for the contact.



The screenshot shows the Dynamics 365 interface for a contact record. The top navigation bar includes buttons for Save, Save & Close, New, Deactivate, Connect, Assign, Email a Link, Delete, Move Contact (highlighted), Refresh, and Search. The contact record is for Clark Kent, saved, with a dropdown menu for 'Contact'. The 'Summary' tab is active, showing contact information and a timeline.

CONTACT INFORMATION	
First Name	Clark
Last Name	Kent
Job Title	Reporter
Account Name	 The Daily Planet
Email	clark.kent@thedailyplanet.com
Business Phone	01 668 999 6502
Mobile Phone	07915 973 666
Fax	---
Preferred Method of Contact	Any
Address 1: Street 1	1000 Broaddway
Address 1: Street 2	---
Address 1: Street 3	---
Address 1: City	Metropolis
Address 1: State/Province	Kansas

The timeline section on the right is currently empty, with a search bar and a note input field. A 'Get started' message is displayed: 'Capture and manage all records in your timeline.'



In our example here 'Clark Kent' is moving from 'The Daily Planet' in Metropolis to the 'The Daily Record' in Glasgow, he obviously has heard about the health benefits of haggis. Once the fields have been populated now click 'Move'.

CONTACT INFORMATION

First Name	Clark
Last Name	Kent
Job Title	Reporter
Account Name	The Daily Planet
Email	clark.kent@thedailyplanet.com
Business Phone	01 668 999 6502
Mobile Phone	07915 973 666
Fax	---
Preferred Method of Contact	Any

Timeline

Search timeline

Move Contact

Move to another Account * Yes

New Account * The Daily Record [Lookup](#)

New Job Title * Reporter

New Email * clark.kent@thedailyreco...

New Mobile Number * 07832 830 777

[Move](#)

You can now see him at his new company.

CONTACT INFORMATION

First Name	Clark
Last Name	Kent
Job Title	Reporter
Account Name	The Daily Record
Email	clark.kent@thedailyrecord.com
Business Phone	---
Mobile Phone	07832 830 777
Fax	---
Preferred Method of Contact	Any
Address 1: Street 1	One Central Quay
Address 1: Street 2	---
Address 1: Street 3	---
Address 1: City	Glasgow

Timeline

Search timeline

Enter a note...

Get started

Capture and manage all records in your timeline.