

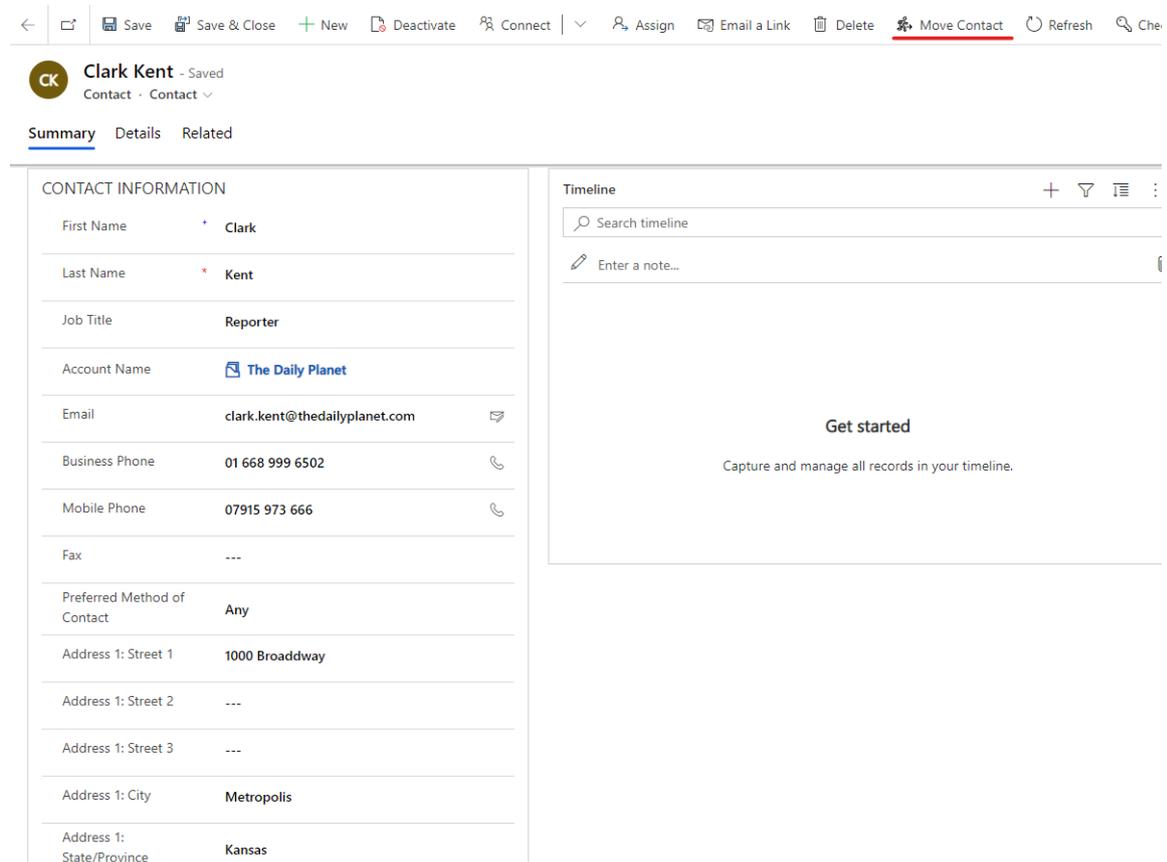
Move contact feature

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 in red), Refresh, and Check. The contact record is for Clark Kent, saved, with a dropdown menu for Contact. The left pane shows the Summary tab with the following contact information:

| 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 right pane shows the Timeline section with a search bar and a note entry field. Below the timeline is a 'Get started' section with the text: '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.