HerdMASTER 4 Tip Sheet

USING CONTACTS

You can view and edit your contact details in Contacts | View/Edit Contacts

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RECOMMENDATIONS

Before adding too many contacts we recommend that you set up some contact worksheets or group codes to separate them into various classifications such as buyers, sellers, abattoirs, suppliers, societies etc.

In this fashion you can easily see the just the contacts you need at that moment.

USING WORKSHEETS

Worksheets work exactly the same way they do for animals; Simply select the contacts you want on one worksheet and hit the Worksheet button and either select an existing worksheet or type in the name of a new worksheet you wish to create.

As with animal worksheets, contacts may belong to multiple worksheets. So you may have one contact who is both a buyer and seller.
USING GROUP CODES

Group codes are a holdover from previous software, however they do have one very important thing, you can use filters on them. This way you could do a search on all contacts belonging to similar group codes, or put in place other conditions such as must belong to particular post codes etc.

Filters can be created in Setup | Filters | Contact Filters.

OWNER

The OWNER contact is generally your details, if you have imported data from HerdMagic then the contact code may be a number (usually 1) for your owner details and then another number for your breeder details. You may always bulk change owner and breeder of animals to any contact code you wish, so you may bulk change all of your animals to the OWNER identity easily.

We do recommend using the OWNER contact code in HerdMASTER.

CONTACT DETAILS

Make sure you enter as much contact information as you can, as this data can be used in NLIS submissions, mail merges, purchase and sales reports and many more areas.

AGENTS

If you have clients or suppliers who use agents then we recommend entering the Agent details before your other contacts, this way you can assign the agent quickly when you are adding your contacts who use them.
ADD A NEW CONTACT

ADDING USING THE VIEW/EDIT CONTACTS WINDOW

On the main view/edit contacts window hit the **Add** button at the bottom.

The following window appears, put in as much info as you can about the new contact, please note there MUST be a contact code given to each contact.

From here you can adjust the individual details of your contact by hitting the **Details** button right next to the **Add** button. Follow on in the Contact Details section.
## IMPORTING CONTACTS THROUGH THE UNIVERSAL FILE IMPORT UTILITY

See the [UFIU manual](#) about how to import files.

**!! IMPORTANT NOTE !!**

Be aware that each contact in the file you are importing **MUST** have a unique Contact Code/Client Code.

In your template, load your CSV or Excel file, assign the correct column names, all contact data except diary entries can be found in the Contact Data selection. The diary entries are stored under the contact diary selection just below.

*Contact Data Shown to the left.*
Above we can see the Contact Details window.

All the basic details remain in the top half of the window.

The tabs along the bottom of the page allow for different information areas to be displayed.

**ADDRESS**

Actual and postal address for the contact.

**CONTACT INFO**

Business phone/fax numbers, website and a prefix to use on animals if this contact is used as a breeder.
ADDITIONAL INFO
This area contains:

Salutation (MR, MRS, DR etc.) for when you do mail merges or have their details on paperwork.

Breeder number, Herd Ident, ABN and firebrand identifiers.

Current Agent.

PIC.

Directions.

ILR Username and Password. (This is used only on OWNER for automatic logging in to ILR subsystems)

DIARY
Diary Entries against the contact. You may add new ones here or remove them.

PICTURES
Pictures of the contact. (please note that similar to animal images, the pictures in here will not be transferred with central sync)

SALES
Lists any sales that are logged in HerdMASTER against the Contact, so if they have sold something to OWNER (us) it will come up here. You may also print a Sales Report or add the sales to worksheets.

PURCHASES
Lists any purchases that are logged in HerdMASTER against the Contact, so if they have bought something from OWNER (us) it will come up here. You may also print a Purchases Report or add the purchases to worksheets.

WORKSHEETS
Lists available Contact Worksheets, what ones this contact is a member of and allows you to alter these details or create a new worksheet.

EMBRYO SALES
Lists any sales of Embryos from this contact to OWNER (us).
AGENT INFO

Lists what other Contacts this Contact acts as an agent for and also lists what sales this Contact has acted as an agent for.

You can also print these lists from here.