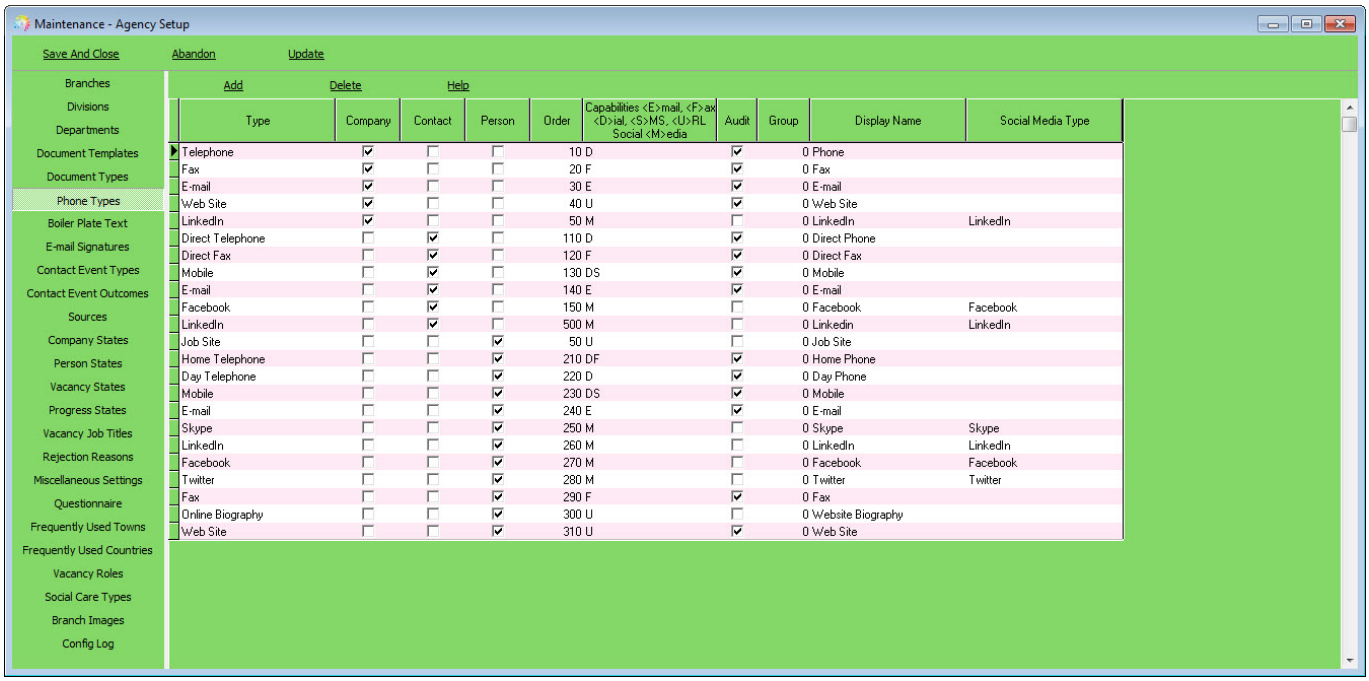
Links to Social Networking

Set up:

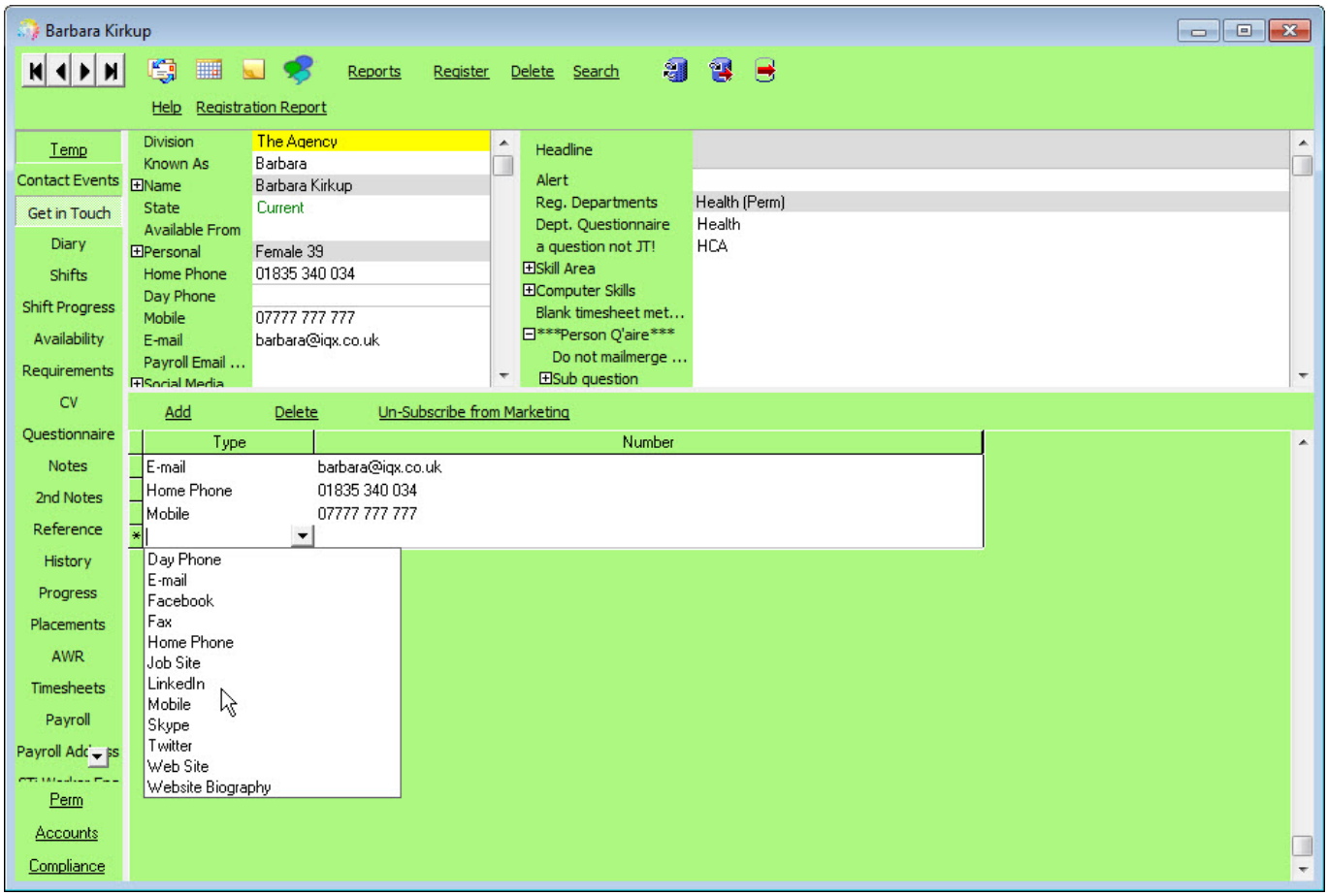
Maintenance> Agency Setup> Phone Types

Add relevant Social Media that your agency will use (Facebook, Twitter, LinkedIn, Skype) for each record type you want it to be available (Company, Contact, Person). Make sure it is given the correct capability ie. 'M' and Social Media Type in the last column.

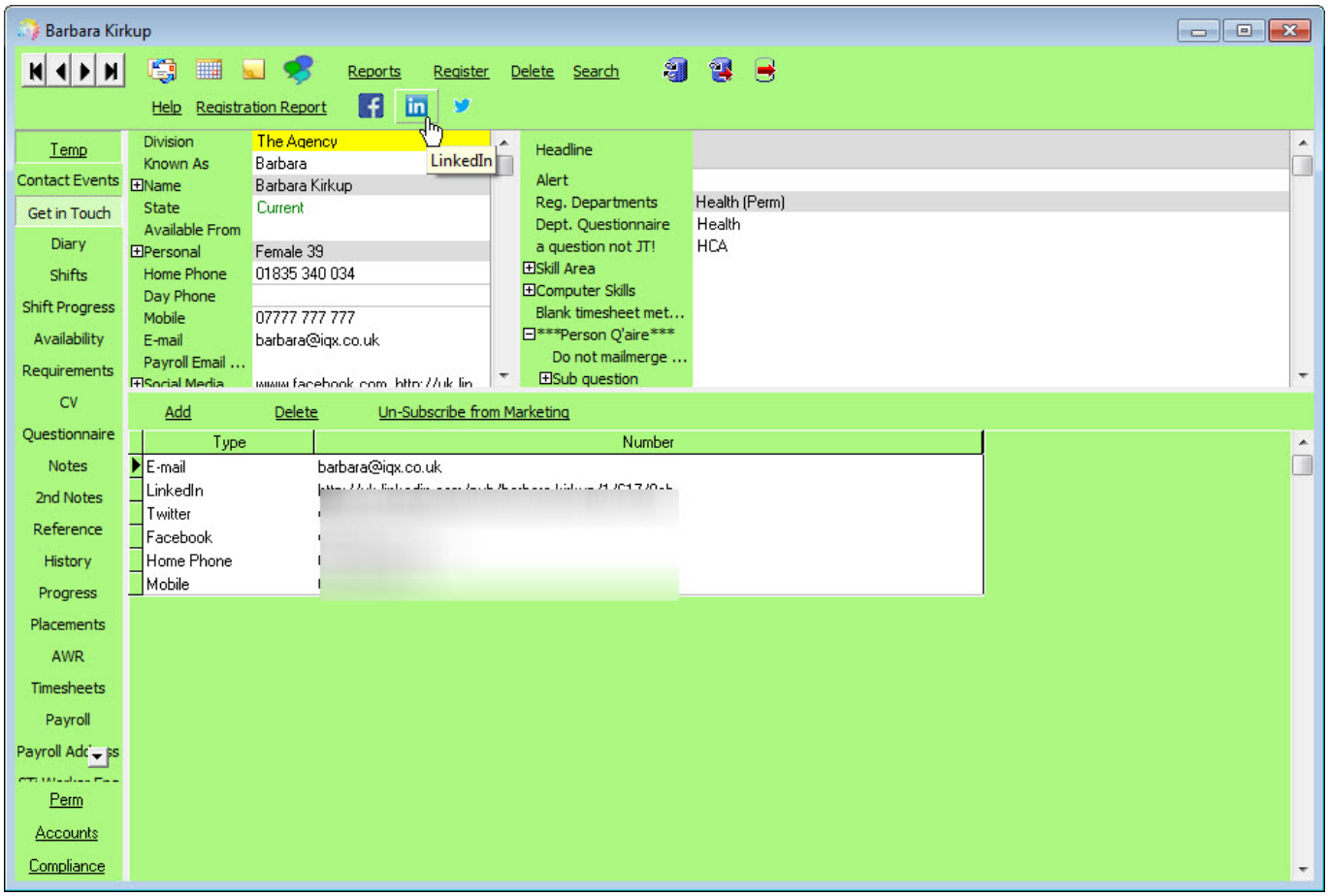


Type	Company	Contact	Person	Order	Capabilities <E>mail, <F>ax <D>ial, <S>MS, <U>RL Social <M>edia	Audit	Group	Display Name	Social Media Type
Telephone	☑	☐	☐	10	D	☑	0	Phone	
Fax	☑	☐	☐	20	F	☑	0	Fax	
E-mail	☑	☐	☐	30	E	☑	0	E-mail	
Web Site	☑	☐	☐	40	U	☑	0	Web Site	
LinkedIn	☑	☐	☐	50	M	☐	0	LinkedIn	LinkedIn
Direct Telephone	☐	☑	☐	110	D	☑	0	Direct Phone	
Direct Fax	☐	☑	☐	120	F	☑	0	Direct Fax	
Mobile	☐	☑	☐	130	DS	☑	0	Mobile	
E-mail	☐	☑	☐	140	E	☑	0	E-mail	
Facebook	☐	☑	☐	150	M	☐	0	Facebook	Facebook
LinkedIn	☐	☑	☐	500	M	☐	0	Linkedin	LinkedIn
Job Site	☐	☐	☑	50	U	☐	0	Job Site	
Home Telephone	☐	☐	☑	210	DF	☑	0	Home Phone	
Day Telephone	☐	☐	☑	220	D	☑	0	Day Phone	
Mobile	☐	☐	☑	230	DS	☑	0	Mobile	
E-mail	☐	☐	☑	240	E	☑	0	E-mail	
Skype	☐	☐	☑	250	M	☐	0	Skype	Skype
LinkedIn	☐	☐	☑	260	M	☐	0	LinkedIn	LinkedIn
Facebook	☐	☐	☑	270	M	☐	0	Facebook	Facebook
Twitter	☐	☐	☑	280	M	☐	0	Twitter	Twitter
Fax	☐	☐	☑	290	F	☑	0	Fax	
Online Biography	☐	☐	☑	300	U	☐	0	Website Biography	
Web Site	☐	☐	☑	310	U	☑	0	Web Site	

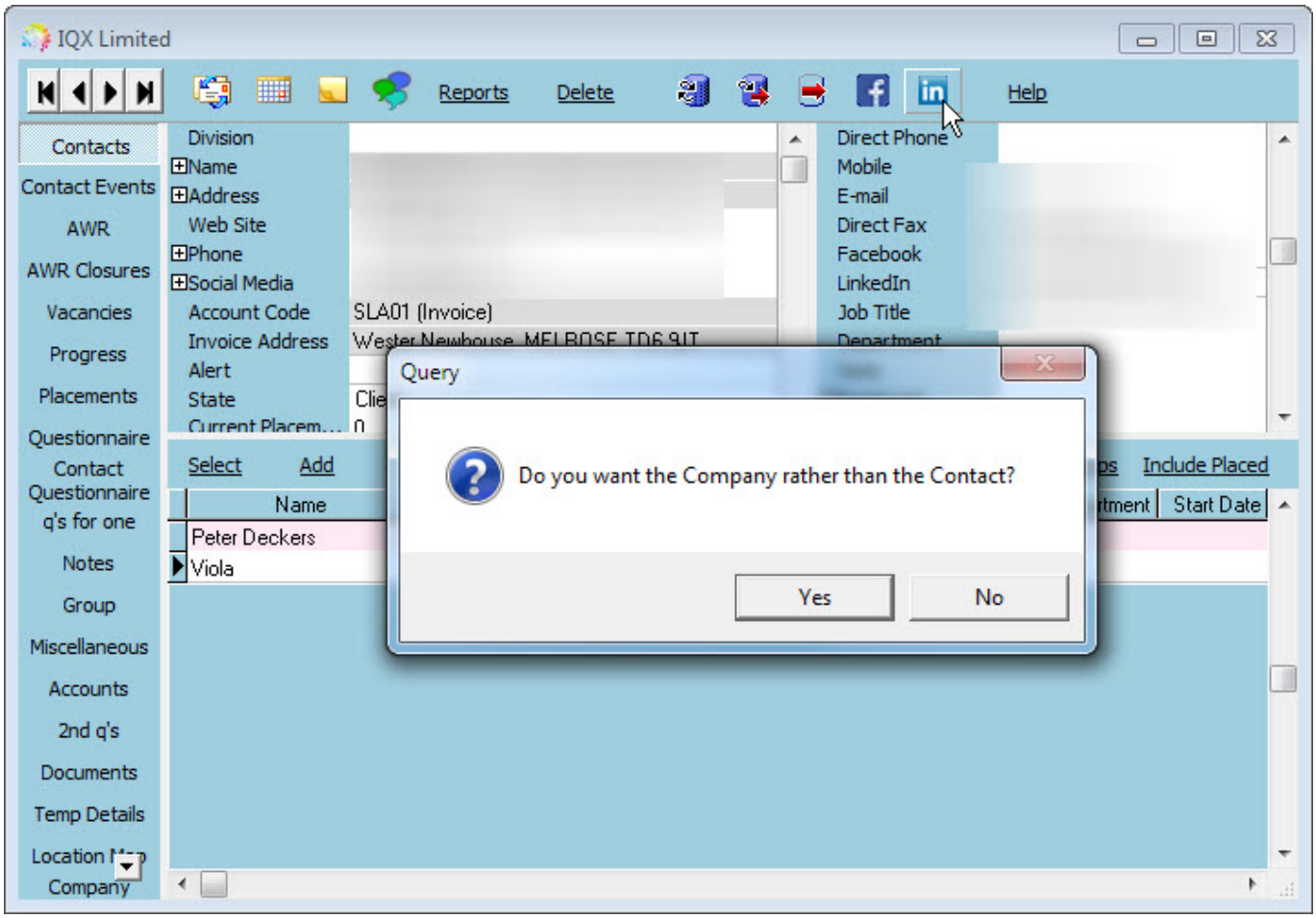
There is a new tab on a person record (Get In Touch or different if customised by your agency). On company and company contacts, the social media addresses are contained underneath the other contact types.



If there is an address entered of that phone type, there will then be a corresponding button at the top of the form. Clicking on this button will take you directly to their social media page.



On a company record, if there are Social Media addresses of the same type for both the company and the contact, you will be prompted to select which one on pressing the button:



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