

# Organizing Accounts, Contacts And Events: Contacts

PlayMaker CRM organizes content by using the following acronym: *A.C.E.* (Accounts, Contacts, Events). This method of organization ties these components together, unifying contacts and accounts to any events, call notes, or expenses. To see how PlayMaker defines Accounts, Contacts and Events, or to learn more about using *A.C.E.* with accounts, [click here](#). This article will illustrate how Contacts relate to Accounts, and why they should always be associated.

## Associating Contacts to Accounts

All contacts in PlayMaker CRM should be associated with an account. In the *All Contacts* or *My Contacts* views, the *Account* column should be listed, showing which account a contact is assigned to. If a user is adding a new contact to PlayMaker, or a contact has already been saved without an account, an account can be easily added in one of two ways in the web environment:

- Before creating a new contact, click on the *Accounts* navigation link, then search for the appropriate account. Click on the account to view the *Account Details*, then scroll down to the *Contacts* section. Click the blue *New Contact* button. This new contact will automatically be associated to the selected account.
- In the *All Contacts* or *My Contacts* view, click *Edit* next to the contact that needs to be assigned to an account. Click on the *Account* text box. A search dialog box will appear, prompting to search for the correct account. Search for the account, or find the account in the list, then click *Select* in the *Actions* column.

**Tip:** If a contact was entered without address or phone details, users can click the *Copy Account Details* button (shown below) while editing the *Contact Details*. This will allow the user to select a few details to populate with information already existing in the *Account Details*.

Save

Save & New

Cancel

Copy Account Details

Delete

## Accounts vs. Contacts: Getting the complete picture

Accounts act as a central hub for information, to make the most out of calling on facilities or physicians. When users create sales calls with contacts that are not associated to an account, the notes for the call will only reside in two places: the calendar, and the *Contact Details*. When contacts are associated with an account, viewing the Contact Details can show an incomplete picture of what's happening at a facility, not report the user's return of investment of their time.

Below are two screenshots taken from details of a contact. The top image shows the *Monthly Events* for roughly the past 90 days, while the bottom image shows the *Historical Call Notes* for the same period.

Monthly Events 08/01/2016 to 10/31/2016 Go

ACTIONS	USER	TIME	LOCATION	EVENT TYPE	ACCOUNT	ASSOCIATED CONTACTS	SUBJECT	CALL/VISIT NOTES
<a href="#">View</a>   <a href="#">Edit</a>	James Barnes	9/8/2016 3:08 PM		Meeting	OCEAN PARK HEALTH CENTER	LISA GOLDEN	Ocean Park - Bi-weekly	Met with Dr. Golden. Discussed our services. Other physician (Anne Simons) was not available for introduction, and Aaron was out of the office.
<a href="#">View</a>   <a href="#">Edit</a>	James Barnes	10/20/2016 3:08 PM		Meeting	OCEAN PARK HEALTH CENTER	AARON DEL TREDICI ANNE SIMONS Cindy Moon LISA GOLDEN	Ocean Park - Bi-weekly	Added Cindy to recurring event. Finally met with all three physicians. Discussed their needs, and talked about our intake process, on-site physician. Aaron will be sending in his first referral next week. Bring "Thank You" card next visit!

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Historical Call Notes 08/01/2016 to 10/31/2016 ordered by Event Date Descending Go

ACTIONS	NOTE	EVENT DATE	ADDED BY
<a href="#">View</a>	Added Cindy to recurring event. Finally met with all three physicians. Discussed their needs, and talked about our intake process, on-site physician. Aaron will be sending in his first referral next week. Bring "Thank You" card next visit!	10/20/2016 3:08 PM	James Barnes
<a href="#">View</a>	Met with Dr. Golden. Discussed our services. Other physician (Anne Simons) was not available for introduction, and Aaron was out of the office.	09/08/2016 3:08 PM	James Barnes

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The major difference between the *Monthly Events* and *Historical Call Notes* are the details that are shown. The *Monthly Events* show more information about the event itself (who attended, what kind of meeting it was, the account that it is associated with, etc.), while the *Historical Call Notes* simply provide a quick way to revisit what might have been discussed or observed during prior calls.

Monthly Events 08/01/2016 to 10/31/2016 Go

ACTIONS	USER	TIME	LOCATION	EVENT TYPE	ACCOUNT	ASSOCIATED CONTACTS	SUBJECT	CALL/VISIT NOTES
<a href="#">View</a>   <a href="#">Edit</a>	James Barnes	8/11/2016 3:08 PM		Meeting	OCEAN PARK HEALTH CENTER	AARON DEL TREDICI	Ocean Park - Bi-weekly	Met Aaron. Discussed their needs, and informed him of how we could be a great partner. Changed call to bi-weekly, as there are two other physicians at this facility to meet, and a lot of potential.
<a href="#">View</a>   <a href="#">Edit</a>	James Barnes	8/25/2016 3:08 PM		Meeting	OCEAN PARK HEALTH CENTER	AARON DEL TREDICI	Ocean Park - Bi-weekly	Spoke with Aaron briefly, but he was heading into an appointment with a patient. Other physicians were busy. Need to determine best time to come by.
<a href="#">View</a>   <a href="#">Edit</a>	James Barnes	9/8/2016 3:08 PM		Meeting	OCEAN PARK HEALTH CENTER	LISA GOLDEN	Ocean Park - Bi-weekly	Met with Dr. Golden. Discussed our services. Other physician (Anne Simons) was not available for introduction, and Aaron was out of the office.
<a href="#">View</a>   <a href="#">Edit</a>	James Barnes	9/22/2016 3:08 PM		Meeting	OCEAN PARK HEALTH CENTER	ANNE SIMONS	Ocean Park - Bi-weekly	Met with Anne Simons. Introduced myself, discussed our facility. Set meeting to chat with Anne and Lisa in 2 weeks.
<a href="#">View</a>   <a href="#">Edit</a>	James Barnes	10/6/2016 3:08 PM		Meeting	OCEAN PARK HEALTH CENTER	ANNE SIMONS Cindy Moon	Ocean Park - Bi-weekly	Met Cindy Moon, receptionist (who has been otherwise occupied through every other visit thus far). Chatted with her. Scheduled meeting with Lisa and Anne unable to happen, as Lisa had a last minute appointment that she needed to take just before my visit.
<a href="#">View</a>   <a href="#">Edit</a>	James Barnes	10/20/2016 3:08 PM		Meeting	OCEAN PARK HEALTH CENTER	AARON DEL TREDICI ANNE SIMONS Cindy Moon LISA GOLDEN	Ocean Park - Bi-weekly	Added Cindy to recurring event. Finally met with all three physicians. Discussed their needs, and talked about our intake process, on-site physician. Aaron will be sending in his first referral next week. Bring "Thank You" card next visit!

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Historical Call Notes		08/01/2016	to	10/31/2016	ordered by	Event Date	Descending	Go
ACTIONS	NOTE				EVENT DATE	ADDED BY		
<a href="#">View</a>	Added Cindy to recurring event. Finally met with all three physicians. Discussed their needs, and talked about our intake process, on-site physician. Aaron will be sending in his first referral next week. Bring "Thank You" card next visit!				10/20/2016 3:08 PM	James Barnes		
<a href="#">View</a>	Met Cindy Moon, receptionist (who has been otherwise occupied through every other visit thus far). Chatted with her. Scheduled meeting with Lisa and Anne unable to happen, as Lisa had a last minute appointment that she needed to take just before my visit.				10/06/2016 3:08 PM	James Barnes		
<a href="#">View</a>	Met with Anne Simons. Introduced myself, discussed our facility. Set meeting to chat with Anne and Lisa in 2 weeks.				09/22/2016 3:08 PM	James Barnes		
<a href="#">View</a>	Met with Dr. Golden. Discussed our services. Other physician (Anne Simons) was not available for introduction, and Aaron was out of the office.				09/08/2016 3:08 PM	James Barnes		
<a href="#">View</a>	Spoke with Aaron briefly, but he was heading into an appointment with a patient. Other physicians were busy. Need to determine best time to come by.				08/25/2016 3:08 PM	James Barnes		
<a href="#">View</a>	Met Aaron. Discussed their needs, and informed him of how we could be a great partner. Changed call to bi-weekly, as there are two other physicians at this facility to meet, and a lot of potential.				08/11/2016 3:08 PM	James Barnes		

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Looking at the same fields that are contained in the associated account (both of the above images), it should be noted that the contact's information was not providing a complete view of all of the activity on the account. Again, the *Monthly Events* are shown in the top image, while the *Historical Call Notes* follow. To view as much information as possible, it is suggested to refer to the account whenever possible providing the best insight into each facility.

### Return on Investment and Reporting

In PlayMaker CRM, the return on investment is shown by comparing the number of sales calls (or events) to the number of referrals that are generated. These comparisons are available for both contacts and accounts, and can be viewed by scrolling to the bottom of the Account Details or Contact Details and viewing the 3-month trend graphs and table. The numbers presented for the account provide better visibility to the return on investment of the time spent at that particular facility, rather than limiting the view to the contributions of time spent with a single individual.

A.C.E. also is used in reporting, as most content is filtered by Accounts. Two examples would be the *Daily Visit Report* and the *Advanced AE Summary Report*. The *Daily Visit Report* gives a snapshot of sales activities for a specific period of time, which can be filtered to display all events for a particular account, but not filtered by contacts. Similarly, the *Advanced AE Summary Report* shows a snapshot of the current and prior weeks open or completed events, and the number of accounts owned by the user that have had sales activity (as well as how many haven't had activity), which bases activity upon events associated with the account, not the sales activity of the contacts of an account.

**Note:** It is important to note that account ownership (or assignment) also factors heavily into reporting and dashboard population.