Using Contax Org. Charts

1 Search for the contact's organization, and if unfound, search for the contact's last name.

Org./Contact Found? — No → Create an org. bucket record and org. chart, and section as needed. Link all org. buckets to their sections.

Yes

2 Review each record to locate a possible existing org. chart.

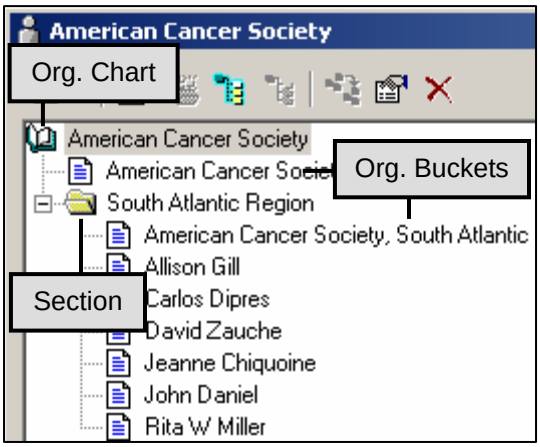
Chart Exists? — No → (back to Create an org. bucket record and org. chart, and section as needed. Link all org. buckets to their sections.)

Yes

3 * Update the existing org. chart and structure as needed.

4 * Go to the desired org. chart location and create a new contact record to reside there.

Org Chart Example



Org. Chart Rules

- Only customer service specialists assigned to an organization may modify its existing org. chart folders and sections.
- All organizations and groups must have an org. chart, even with one contact. However, unaffiliated individuals are not placed within an org. chart.
- Each organization must have an org. bucket record placed under its highest org. chart level and each section within that chart. The highest level can actually be a state and/or nationwide parent organization.
- Investigate highest organization levels for Delaware contacts only.
- Sections and sub-sections are created for logical groups and sub-groups within the organization: every section and sub-section must have an org. bucket record.
- Some org. charts have unintuitive structures: For example, All Delaware public and private schools fall under the Delaware School Districts org. chart.

***** Refer to your Contax manual for detailed software procedures.

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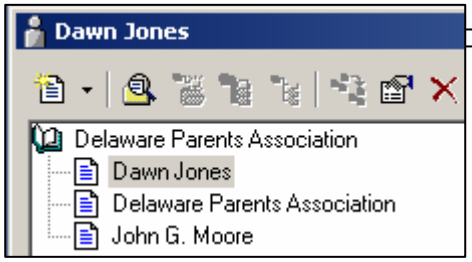
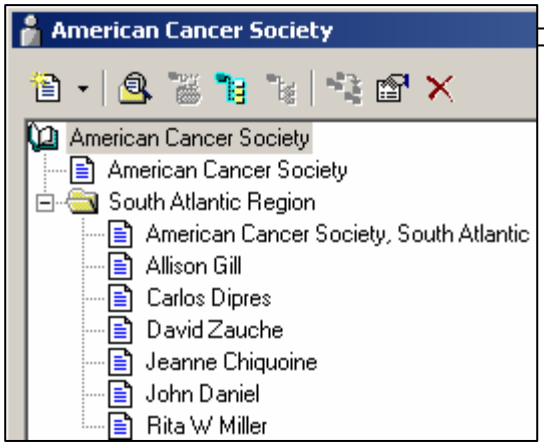
Contax Org. Chart Examples



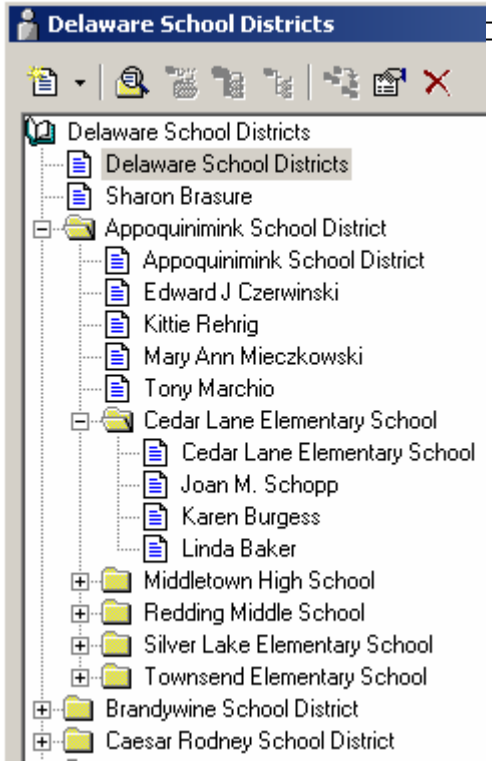
One Level Deep

- No need to create a section to group contacts.
- One org. bucket for the top level—Delaware Parents Association.
- All contacts under Delaware Parents Association.



Two Levels Deep

- One org. bucket for the top level—American Cancer Society.
- Section created for South Atlantic Region.
- American Cancer Society, South Atlantic Region Org. bucket created and linked to South Atlantic Region section.
- Contacts in South Atlantic Region linked to section, not the top level.



Three Levels Deep

- One org. bucket for the top level—Delaware School Districts.
- Section created for each school district.
- Org. buckets created for each school district section.
- Sub-sections created for each school.
- Contacts in each section and sub-section linked to their folders, not the top level.

Guidelines for Grouping Contacts

- Sections and sub-sections are created to logically group contacts. These are usually defined by the customer and stated as the names of facilities, divisions, departments, etc.
- Use groupings defined by the organization.
- Only invest deep research into Delaware-based organization structures.

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