

Address Book Overview

The **Address Book** is the central hub for managing companies, departments, and individuals within Dewesoft CRM. It forms the foundation of your CRM data, enabling a clear and hierarchical view of your business relationships.

This chapter outlines how the four key entity types — **Accounts**, **Child Accounts**, **Departments**, and **Contacts** — relate to each other and how they form a structured, visual **account family tree**.

Account

An **Account** represents a **legal business entity** registered in a national company register.

Key Attributes:

- **Legal Company Name**
- **Tax Number**
- **Billing Address**

Accounts are the top-level entities in your CRM. They may have related child entities (Child Accounts, Departments, Contacts), but they themselves are standalone representations of registered companies.

Child Account

A **Child Account** is functionally identical to a standard Account, with the same legal attributes. The distinction lies in its relationship.

When is an Account a Child Account?

- When it is **linked as a child** to another Account.

Typical use cases for Child Account(s):

- A **subsidiary**
- A **spin-off company**

- A **branch office** within a larger account group with its own registered legal entity, billing address, and TAX number

This relationship enables **grouping multiple legal entities** under one parent, helping you track corporate structures and related business units.

Department

A **Department** is a **subdivision within an Account** (or Child Account). It does *not* exist independently and always inherits from a parent Account.

Use Cases:

- Internal teams such as:
 - *NVH Testing Department*
 - *Quality Control*
 - *Durability Lab*
 - *Etc.*
- Different **physical locations** under the same legal company
 - e.g., “Volkswagen Testing Center – Munich Branch”

Key Department Rules:

- Every Department **must belong to an Account or Child Account**
 - Departments are used to **group opportunities, activities, and contacts** at a finer level
 - A Department is **not a legal entity**, but a logical grouping mechanism
 - You cannot set the billing address to a department, as it inherits one from its parent Account. If you need to change the billing address of a Department, you are probably working with a different Account. In this case, it's better to open a separate account and link it to your parent Account as a Child Account.
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Contact

A **Contact** is a **real individual** that you interact with. The contact will be uniquely identified by **Email address**.

Relationship Rules:

- A Contact may:
 - Belong to **an Account only**.
 - Belong to **a Department**, in which case it also **automatically belongs to the parent Account**.
- Contacts can be linked to **multiple Departments** within the same or related Accounts.

This flexibility allows you to accurately model the real-world scenario of professionals who:

- Operate across multiple teams or departments
- Are involved in several roles within a business relationship

Account Family Tree

The CRM's **Account Family Tree** visually represents hierarchical relationships between:

- Accounts and Child Accounts
- Departments
- Contacts

This structure allows you to:

- **Easily navigate** complex corporate hierarchies
- **Group related entities** under a unified umbrella
- **Improve visibility** into how different parts of an organization interact with Dewesoft

“ You can view the Account Family Tree in the CRM to understand all relationships at a glance. A diagram will be provided in this manual to illustrate typical tree structures and linking best practices.”

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