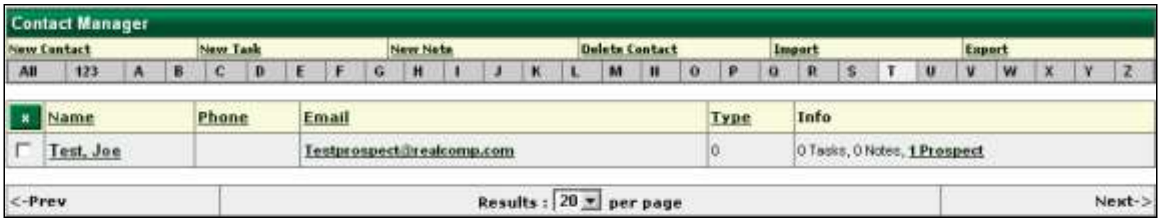
Managing Contact Information

The Contact Manager function lets you add and manage your contact information.



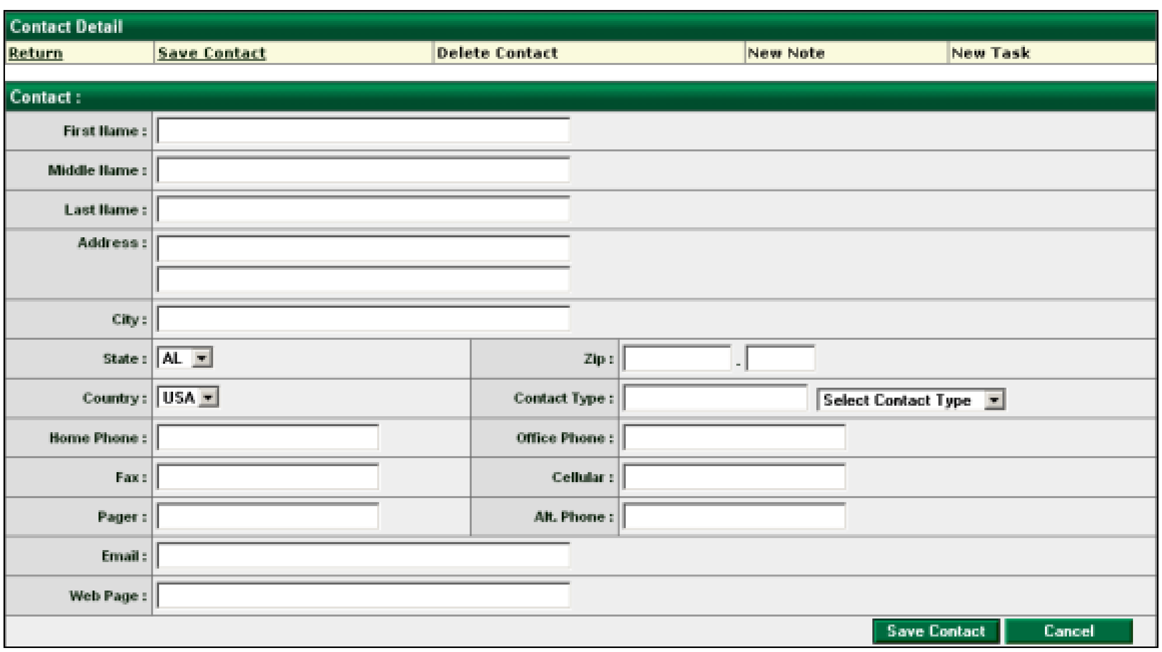
Here you can:

- Add a new contact
- Add a task for a specific contact
- Add a note for a specific contact
- Delete a contact
- Import a group of contacts from another Contact Management program
- Export Realcomp *Online*® contacts to another Contact management program.

You can also choose to view **All** contacts or select a specific letter to view contacts who's last names begin with the selected letter.

➢ **Add a New Contact:**

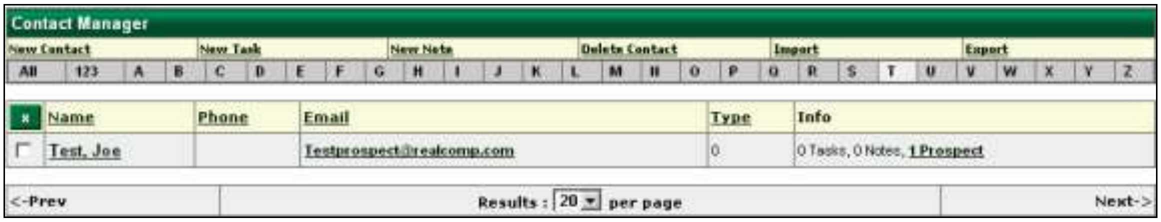
1. Click the **New Contact** link in the **Contact Manager** toolbar.
2. In the New Contact page, enter the requested information into the fields.



3. Click **Save Contact**.

➢ **Find an Existing Contact:**

Choose the letter tab that represents your contact's last name. For instance, if you want to find Joe Test, click the **T** tab.



You can click  to view a list of all your contacts in alphabetical order.

➢ **View Contact Details:**

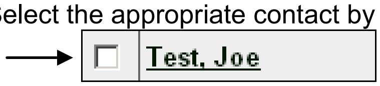
1. Click the contact name to view all details.

➢ **Edit Contacts:**

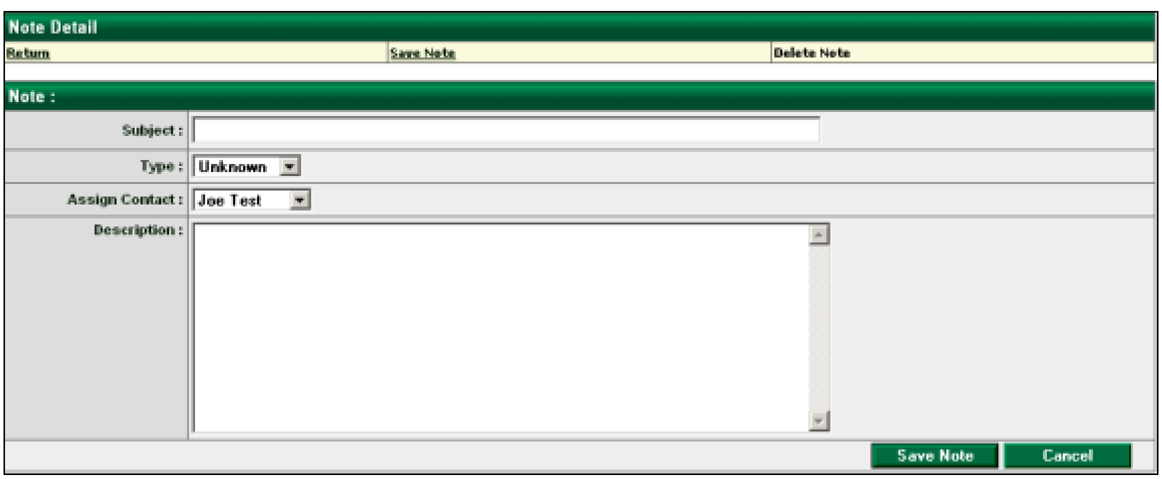
1. Click the contact name from your list of contacts.
2. Enter new or changed information into the **Contact Detail** page.
3. Click **Save Contact**.

➢ **Add a Note to a Contact from the Contact List:**

1. Select the appropriate contact by clicking the check box next to the contact's name



2. Click the  link on the **Contact Manager** toolbar.
3. Enter the Subject, Note Type and Description information in the **Note Detail** screen.
4. Click the  link on the **Note Detail** toolbar.



➢ **Add a Task to a Contact from the Contact List:**

1. Select the appropriate contact by clicking the check box next to the contact's name

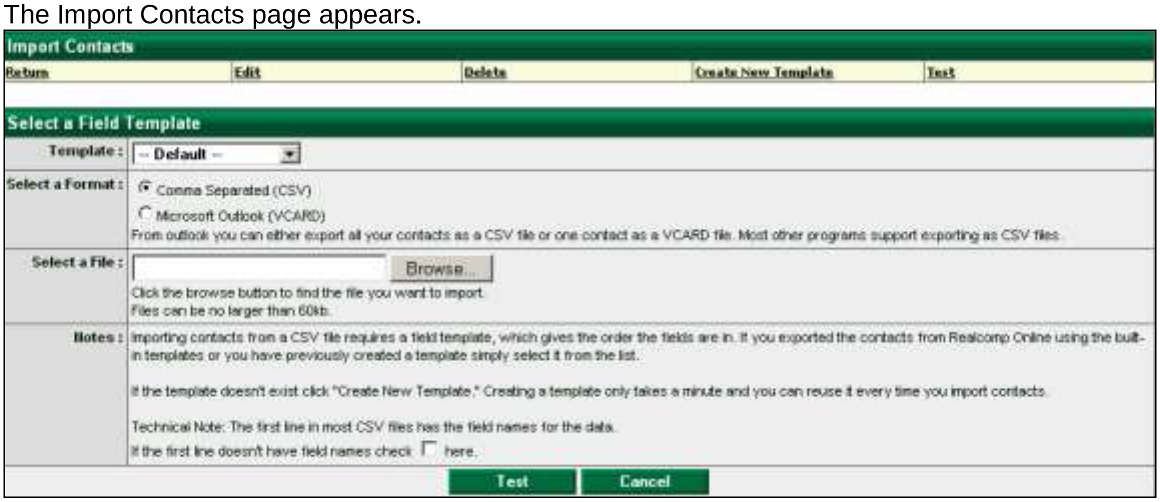
2. Click the New Task link on the **Contact Manager** toolbar.
3. Enter the Subject, Status, Type, Dates, Times and Description information in the **Task Detail** screen.
4. Click the Save Task button.

- **Add a Task to a Contact from the Contact Detail Screen:**

1. Click the contact's name to enter the Contact Detail Screen.
2. Click the New Task link on the **Contact Detail** toolbar.
3. Enter the Subject, Note Type and Description information in the **Note Detail** screen.
4. Click the Save Task link on the **Note Detail** toolbar

- **To import contacts:**

1. Click the Import link on the **Contact Manager** toolbar.
   The Import Contacts page appears.



2. From the **Template** area, select "Default". The template determines the order of the fields in the CSV file.
3. In the **Select a format** area, choose the "Comma Separated (CSV)" format.
4. From the **Select a file** area, select the file to import by clicking **Browse** and locating the file.
5. If the first line of the imported file does not have field names, check the box provided.
6. Click **Test**.

   The imported data now appears on the screen. Any duplicate contacts display a check mark to enable the removal of these contacts.

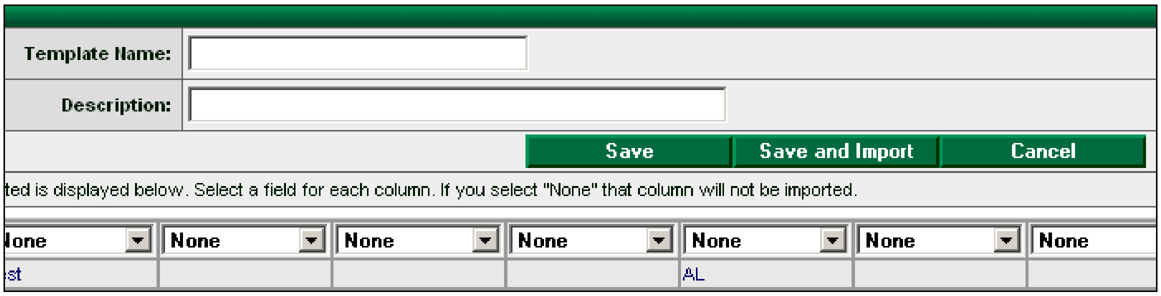
7. When all changes are complete, click **Import**. Your contacts now appear in your Realcomp *Online*® Contact Manager

- **To Create a New Contact Template:**

  Complete the following steps to create a new template and change the default order of the fields:

1. Click the Import link.
2. Select a file to import.
3. Click Create New Template.

   The Create New Import Map page appears.



4. Enter a name for your template in the **Template Name** field and a description into the **Description** field.
5. In each column choose the appropriate field to be imported.

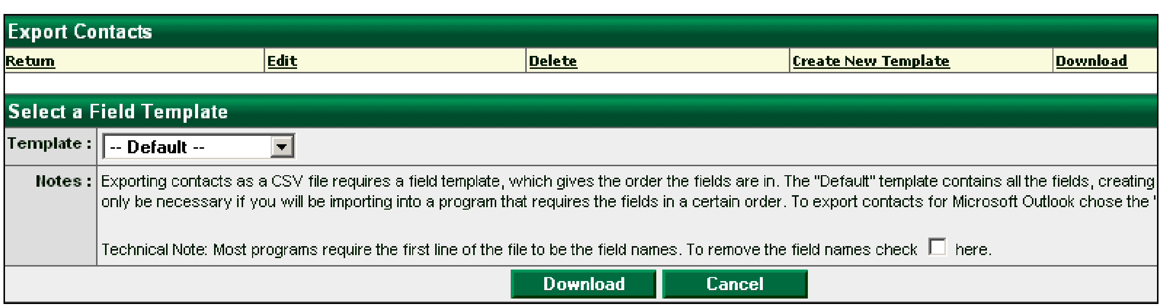
   Any column displaying **None** will not be imported.

6. Click **Save** or **Save and Import**.

- **To export contacts:**

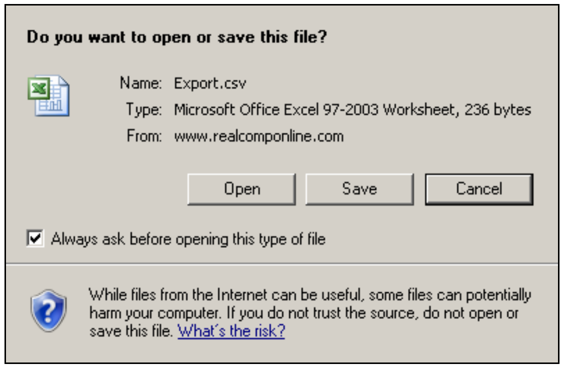
1. Click **Export**.

   The Export Contacts page appears.

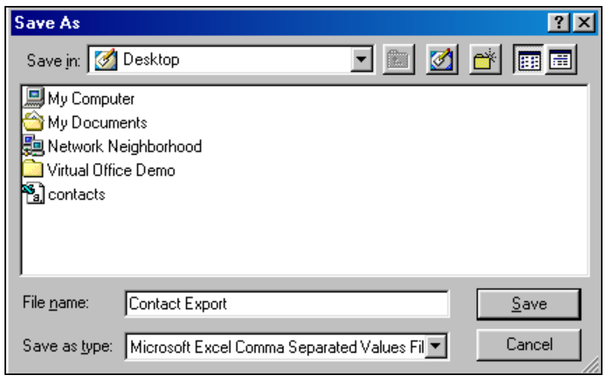


2. From the **Template** area, select "Default". The template determines the order of the fields in the CSV file.

3. To remove the contacts' field names, check the box provided.
4. Click **Download**. The File Download window appears.



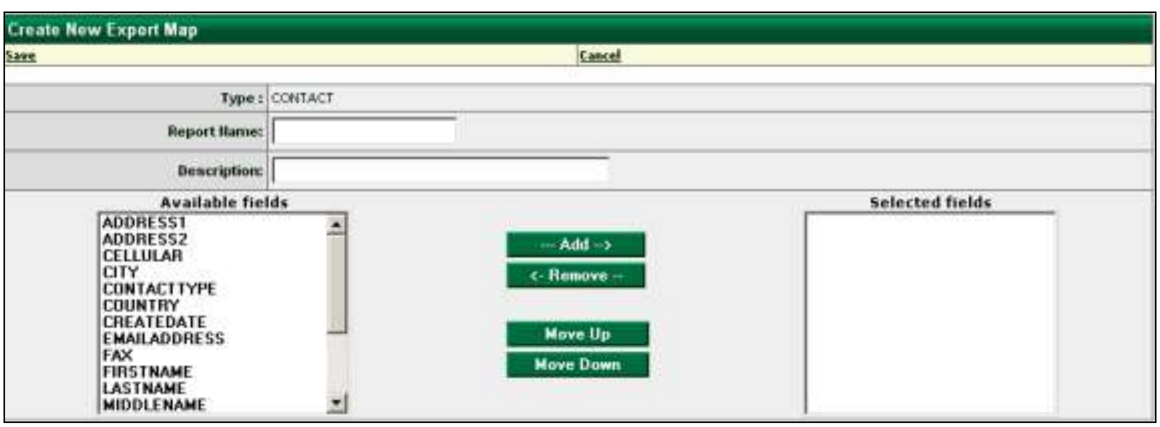
5. Choose **Save**.
6. Save the file to the appropriate folder and with a name you will be able to recognize easily; then click **Save**.



➢ **To Create a New Export Template:**

1. Click the Export link.
2. Select Default template.
3. Click Create New Template.

   The Create New Template page appears.



4. Enter the Report Name and Description.

5. Add all desired fields.
6. Click Save.

➢ **To delete a contact:**

1. Click the check box to the left of each contact you want to delete.

   Note: *To select more than one task, select all desired check boxes.*
   To select ALL tasks click the **[ ]** *next to the* **Subject** *heading.*

2. Click the Delete Contact hyperlink at the top of the screen.
3. Click OK to the Delete Contact dialog box.