

Managing Contact Information

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

Contact Manager																													
New Contact					New Task					New Note					Delete Contact					Import					Export				
All	123	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z		
Name	Phone	Email		Type	Info																								
<input type="checkbox"/>	Test, Joe		Testprospect@realcomp.com		0	0 Tasks, 0 Notes, 1 Prospect																							
<<Prev					Results : 20 per page																Next->								

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.

Contact Detail	
Return	Save Contact Delete Contact New Note New Task
Contact :	
First Name :	<input type="text"/>
Middle Name :	<input type="text"/>
Last Name :	<input type="text"/>
Address :	<input type="text"/>
City :	<input type="text"/>
State : AL	Zip : <input type="text"/> - <input type="text"/>
Country : USA	Contact Type : <input type="text"/> Select Contact Type
Home Phone :	Office Phone : <input type="text"/>
Fax :	Cellular : <input type="text"/>
Pager :	Alt. Phone : <input type="text"/>
Email :	<input type="text"/>
Web Page :	<input type="text"/>
Save Contact Cancel	

3. Click **Save Contact**.

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➤ 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 **All** to view a list of all your contacts in alphabetical order.

➤ View Contact Details:

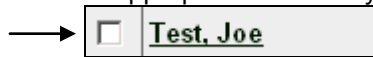
1. Click the contact name to view all details.

➤ Edit Contacts:

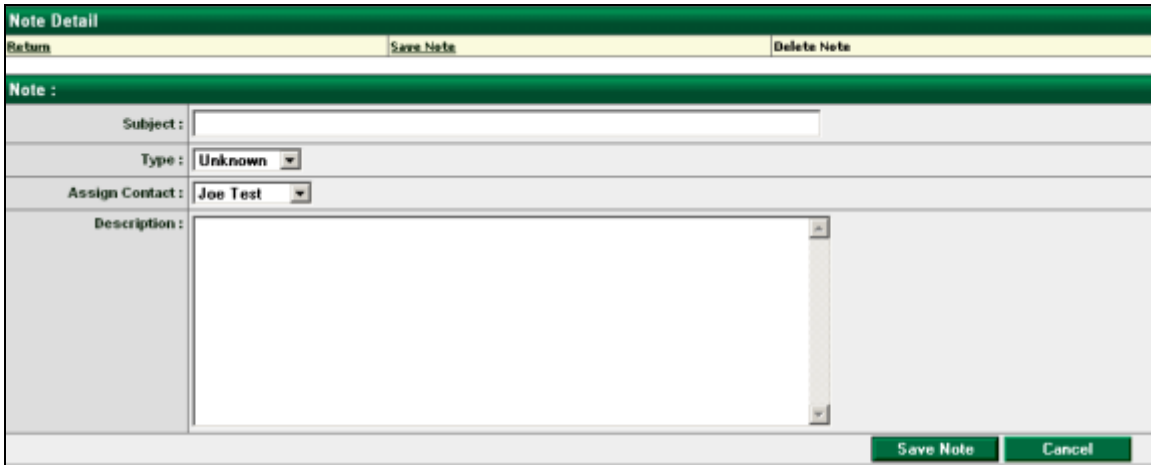
1. Click the contact name from your list of contacts.
2. Enter new or changed information into the **Contact Detail** page.
3. Click **Save Contact**.

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



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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.

Import Contacts

Return Edit Delete Create New Template Test

Select a Field Template

Template: -- Default --

Select a Format:

Comma Separated (CSV)
 Microsoft Outlook (VCARD)
From outlook you can either export all your contacts as a CSV file or one contact as a VCARD file. Most other programs support exporting as CSV files.

Select a File:

Click the browse button to find the file you want to import.
Files can be no larger than 60kb.

Notes: Importing contacts from a CSV file requires a field template, which gives the order the fields are in. If you exported the contacts from Realcomp Online using the built-in templates or you have previously created a template simply select it from the list.

If the template doesn't exist click "Create New Template." Creating a template only takes a minute and you can reuse it every time you import contacts.

Technical Note: The first line in most CSV files has the field names for the data.
If the first line doesn't have field names check here.

Test Cancel

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

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➤ 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.

Template Name:	<input type="text"/>					
Description:	<input type="text"/>					
<input type="button" value="Save"/> <input type="button" value="Save and Import"/> <input type="button" value="Cancel"/>						
ted is displayed below. Select a field for each column. If you select "None" that column will not be imported.						
None	None	None	None	None	None	None
st				AL		

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**.

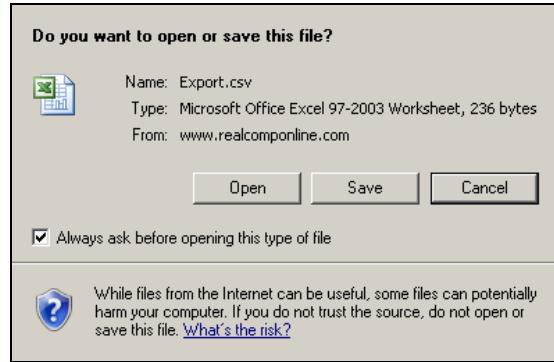
The Export Contacts page appears.

Export Contacts				
Return	Edit	Delete	Create New Template	Download
Select a Field Template				
Template:	-- Default --			
Notes:	Exporting contacts as a CSV file requires a field template, which gives the order the fields are in. The "Default" template contains all the fields, creating only be necessary if you will be importing into a program that requires the fields in a certain order. To export contacts for Microsoft Outlook chose the ' Technical Note: Most programs require the first line of the file to be the field names. To remove the field names check <input type="checkbox"/> here.			
		<input type="button" value="Download"/>	<input type="button" value="Cancel"/>	

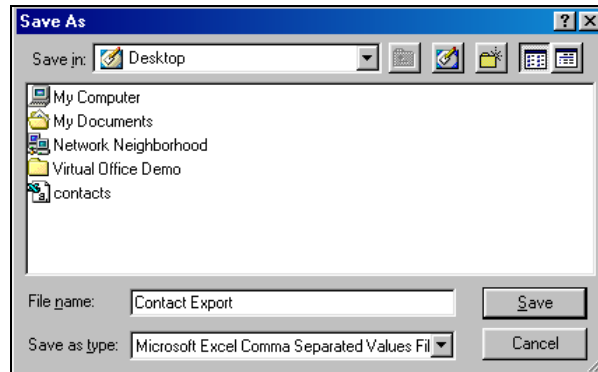
2. From the **Template** area, select "Default". The template determines the order of the fields in the CSV file.

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



- Choose **Save**.
- 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:

- Click the **Export** link.
- Select Default template.
- Click **Create New Template**.

The Create New Template page appears.



- Enter the Report Name and Description.

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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.