

# Manage Contacts

The **Contacts** feature can be used to manage all contacts related to curriculum enrichment activities. It has been designed to be similar to that in Outlook.

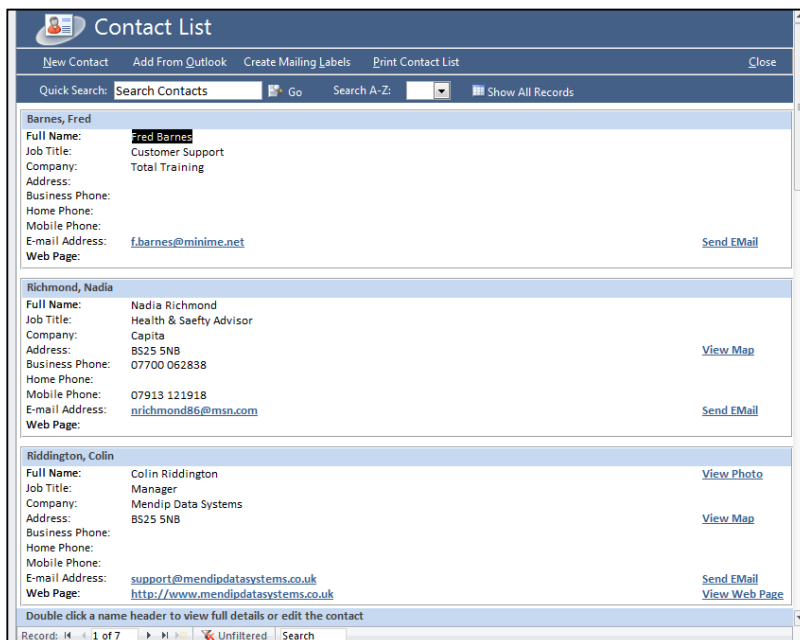
The **Contacts** section of the main screen contains the following items:



## 1. View Contact List

The contacts list shows a summary of contact information

The list can be filtered by name or by the first letter of the contact surname



Emails can be sent directly from the contact list form.

You can also view contact photos, view a map or web page from the contact list form where such data is available

Double click the blue contact header to view the full details for the selected contact

## 2. Add New Contact/ Edit Contact Details

New contacts can be added and existing contacts edited using the contact details form:

Tom Sanders

Go to [ ] Save and New Save and Close E-mail Save As Outlook Contact Delete Contact

General

First Name Tom  
Last Name Sanders  
Company Logan Balloons  
Job Title Sales Manager

Photo not available Add Photo

Phone Numbers  
Business Phone 01904 456789  
Home Phone  
Mobile Phone  
Fax Number

Other  
Category Business  
E-mail t.sanders@logan.co.uk  
Web Page

Address Click to Map  
Street  
City  
County  
Postcode  
Country

Notes

Click the **Save As Outlook Contact** button to export contact details to **Outlook**:

Tom Sanders - Contact

File Contact Insert Format Text Review ZoneAlarm Anti-Spam Desktop

Save & Delete Close Save & New Forward Show E-mail Meeting Address Book Check Names Business Card Picture Categorize Follow Up Private Tags Zoom Zoom

Actions Communicate Names Options Tags

Full Name... Tom Sanders  
Company: Logan Balloons  
Job title: Sales Manager  
File as: Sanders, Tom

Internet  
E-mail... t.sanders@logan.co.uk  
Display as:  
Web page address:  
IM address:  
Phone numbers: 01904 456789

Tom Sanders  
Logan Balloons  
Sales Manager  
01904 456789 Work  
t.sanders@logan.co.uk

Notes

## 3. Import Contacts from Outlook

This routine makes it easy to import selected contacts from Outlook

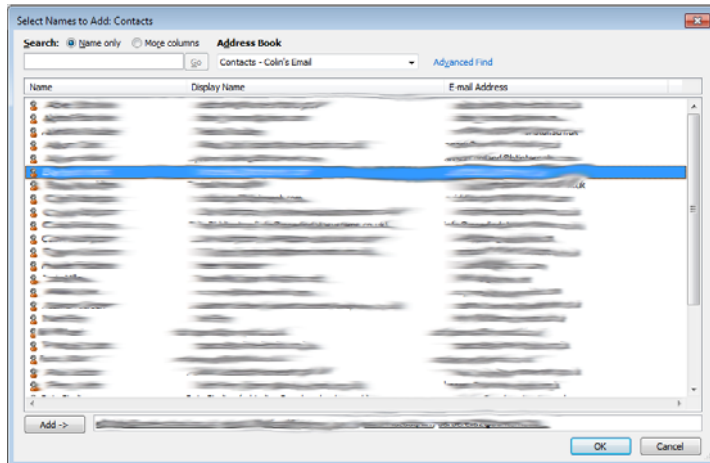
You will be asked whether duplicate contacts should be overwritten automatically:

Import Contacts from Outlook

Automatically overwrite duplicates (Yes) or ask for each duplicate (No)?

Yes No Cancel

A list of contacts is shown. Select those you want to import then click OK:



When the import has been completed, a message similar to this will be shown:



#### 4. Contact Reports

Two types of report are available:

##### Contact list

Alphabetical Contact List			
<b>Fred Barnes</b>			
Total Training Customer Support f.barnes@minime.net			
Business	Home	Mobile	
<b>Nadia Richmond</b>			
Capita Health & Safety Advisor nrichmond@msn.com			
Business BS25 5NB 07700 062838	Home 07913 121918	Mobile	
<b>Colin Riddington</b>			
Mendip Data Systems			
Business BS25 5NB	Home	c.riddington@btinternet.com	
<b>Shaun Rogers</b>			
Brandon Associates Architectural Assistant srogers@btopenworld.com			
Business HA3 0SN	Home 07935 648443	Mobile	
<b>Tom Sanders</b>			
Logan Balloons Sales Manager t.sanders@logan.co.uk			
Business 01904 456789	Home	Mobile	

##### Phone book

Phone Book			
<b>(UNCATEGORIZED)</b>			
Contact Name	Home	Business	Mobile
Colin Riddington			
<b>BUSINESS</b>			
Contact Name	Home	Business	Mobile
Nadia Richmond		07700 062838	07913 121918
Shaun Rogers			07935 648443
Tom Sanders		01904 456789	
Stephen Spalding			
Alyson Wardley			
<b>PERSONAL</b>			
Contact Name	Home	Business	Mobile
Fred Barnes			