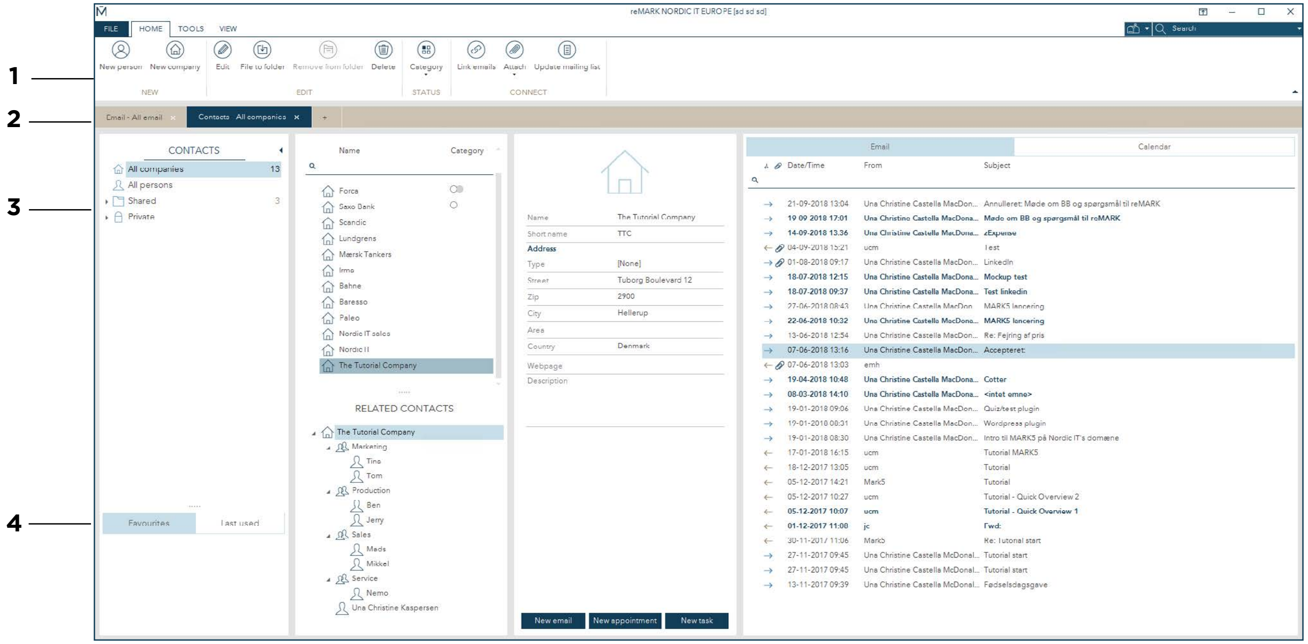
reMARK

Contacts guide

Welcome

The following chapter will introduce the basic navigation and work area in contacts. Contacts is your address book, where you can store information about contacts to share within the company.

1.0 | *Quick overview*



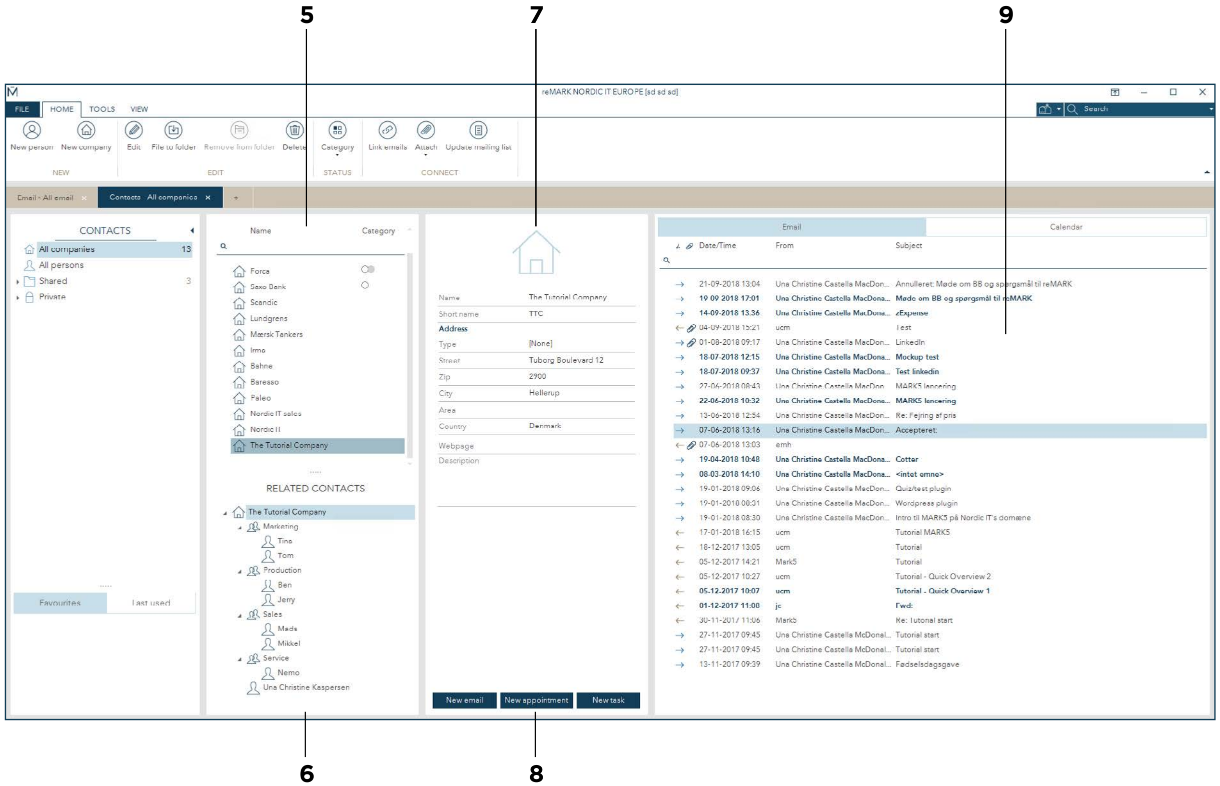
1 | Toolbar is where you can access various functions. The toolbar is sectioned in three tabs; home, tools and view. In home you find the most used contacts features. In tools you find less used features. In view you find layout related features.

2 | Tab menu is just below the toolbar. Click on the **+** sign to create new tabs of content such as email, contacts, calendar, mailing lists, rules and search.

3 | Contacts is where you access your contact groups. Here, you choose if you want to view companies, persons, shared or private contacts. You can also create you own groups.

4 | In the bottom of the folder list you can tap between favorites and last used. You can add favorites by right-clicking on a group and choose add to favorites.

1.0 | Quick overview



5 | Contact list is where you find all contacts from the group you have marked.

6 | Related contacts
Click on a contact and you will see how the contact relates to other contacts in related contacts underneath. A contact is grouped as either a company, a department or a person and can be recognised based upon the icon beside as either:
a company a department or a person.

7 | Contact view
Click on a contact in the contact list to see its details in contact view. The icon shows what type of contact you are viewing. Underneath you see all the contact details. The amount of details on a contact depends on what has been typed in. This means that you will only see the details that has been entered into the system to the contact you have selected.

8 | Buttons
In the bottom of the contacts view, you see three buttons. They allow you to send the contact a new email, set up a new appointment or create a new task for your contact.

1.0 | Quick overview

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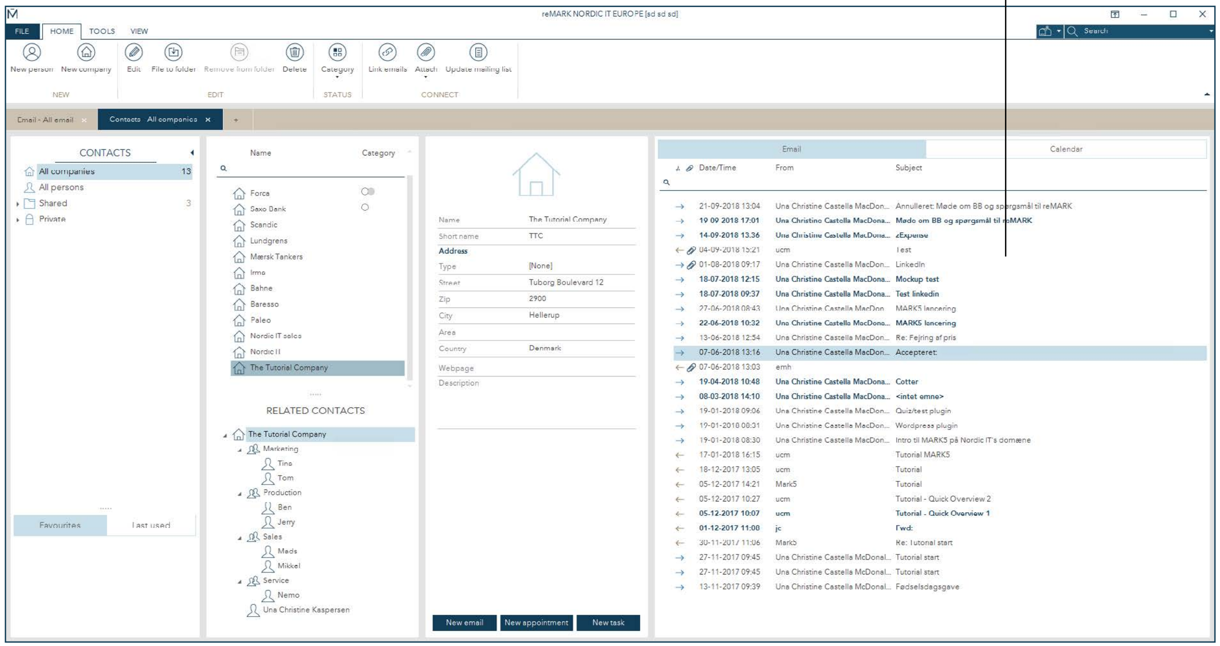


9 | Related activity

Related activity is an overview of the entire correspondence related to the contact you have selected. Tap between emails and calendar. The email tab is a list of all the emails related to the contact. This means that you will see the emails to and from the contact, as well as the emails where the contact has been cc'ed or bcc'ed. You will only see the emails you have access to. The second tab is calendar which contains the appointments and tasks related to the contact.

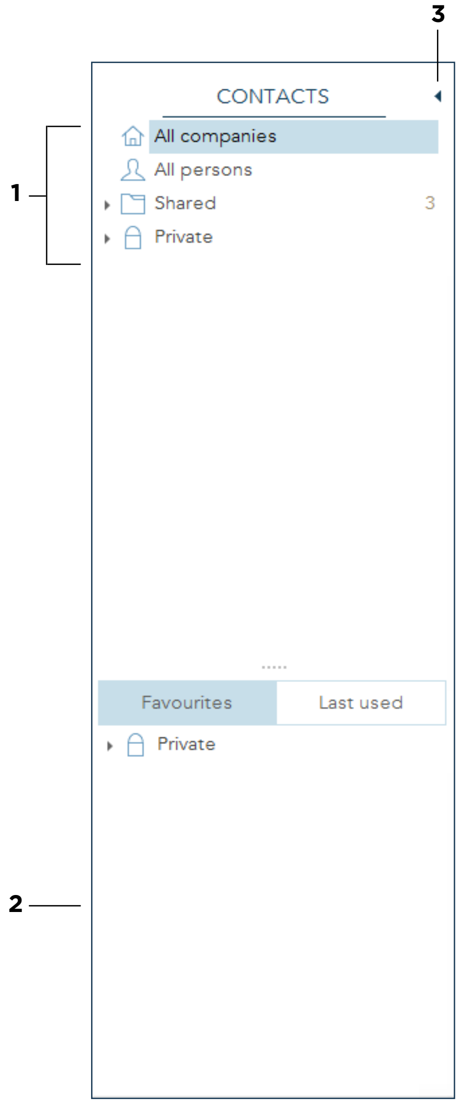
1.1 | Contacts

In the first pane you find groupings of contacts.

1 | All companies is a list of all the contacts registered as companies.
All persons is a list of all contacts registered as persons.
Shared is all contacts that you have access to, but these are also visible to others in the company.
Private is all contacts that only you have access to.
You can create your own groupings in both shared and private.
When you tap a group, the contacts from here will open in the contact list (see chapter 1.2).

2 | In the bottom you can access favorite and last used contacts. Last used contain you last used contacts.
Favorites contain the contact groupings you have added to this area. To do so, right click a group and click add to favorites from the dropdown.

3 | To hide the contacts, click the small arrow in the top right corner of the folder list. To view the folder list again, click the small arrow again.



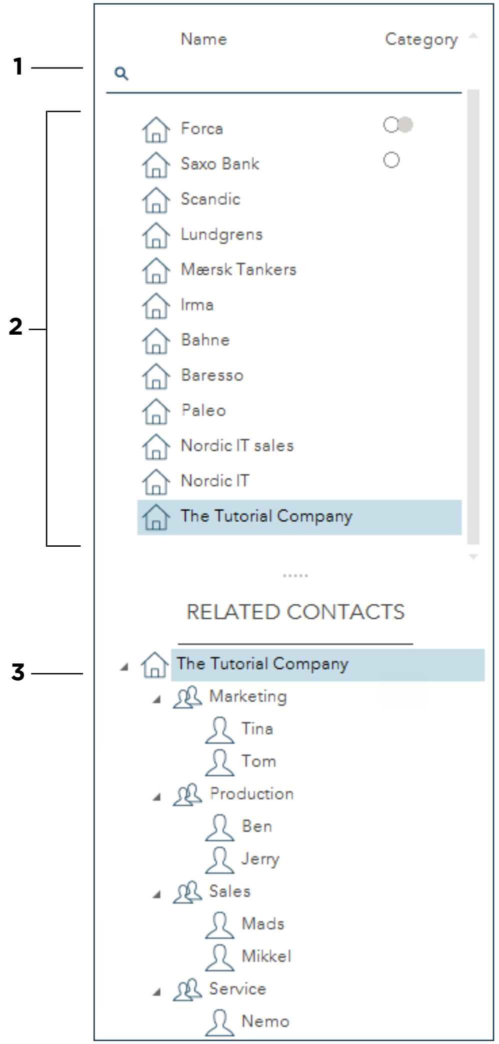
1.2 | Contact list

The second pane is the contact list. Here, you can access the contacts from the choosen grouping.

1 | In the top of the contact list you see the filter row. Here, you can make a quick search for a specific contact. Search by name or category.

2 | In the contact list you can access the contacts from the grouping you have.
The list show the name of the contact and the categories assigned to it. To view a contact, tap the one you wish to view and the details will appear in the contact view (see chapter 1.3).

3 | Related contacts is a list of the contacts related to the contact clicked in area 2. In this screenshot, we are viewing "The Tutorial Company", so in related contacts you can see the company, departments and persons related to the company. The list shows you the structure of the company. In the first level you see the company, in the next the deparments and under each department you see the persons from the department.



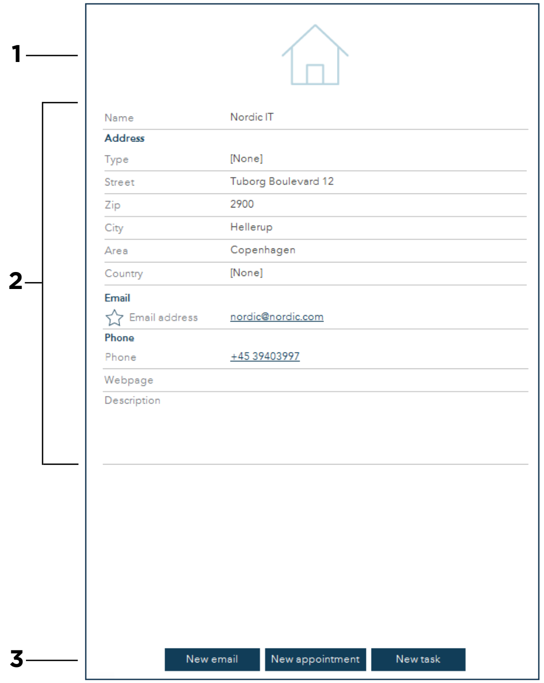
1.3 | Contact view

Contact view is located in the middle pane. This is where you can find information on the contact you have chosen to view from your contact list.

1 | In the contact view, the first thing you will see, is an icon which indicates what type of contact you are viewing; a company, person or department. In this screenshot, we are viewing a company (see chapter 1.0 for a description of the icons).

2 | In this area you see various contact information. The information will vary according to what has been filled out when the contact was added.

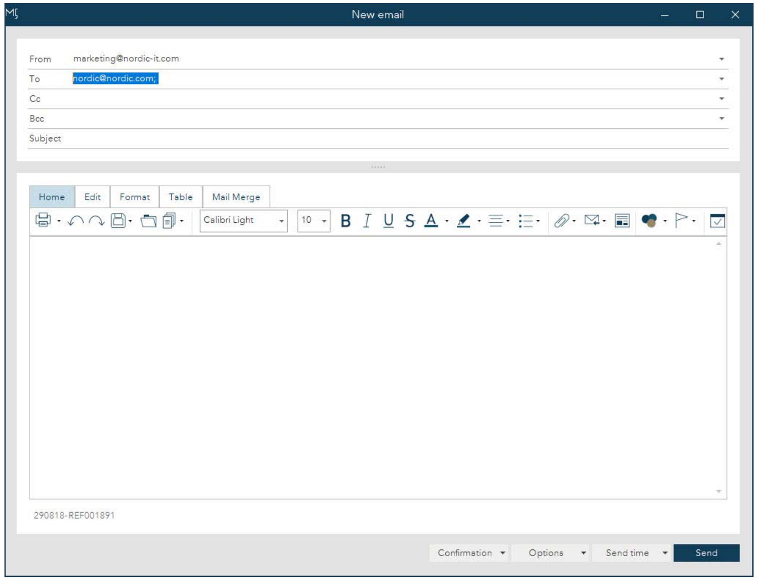
3 | In the bottom three buttons are located: new email, new appointment and new task. These are actions that can be carried out directly from the chosen contact. They will be described in chapter 1.3.1.

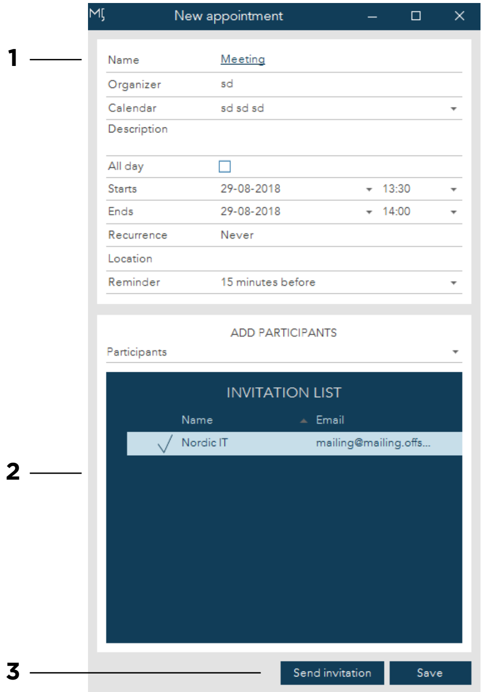


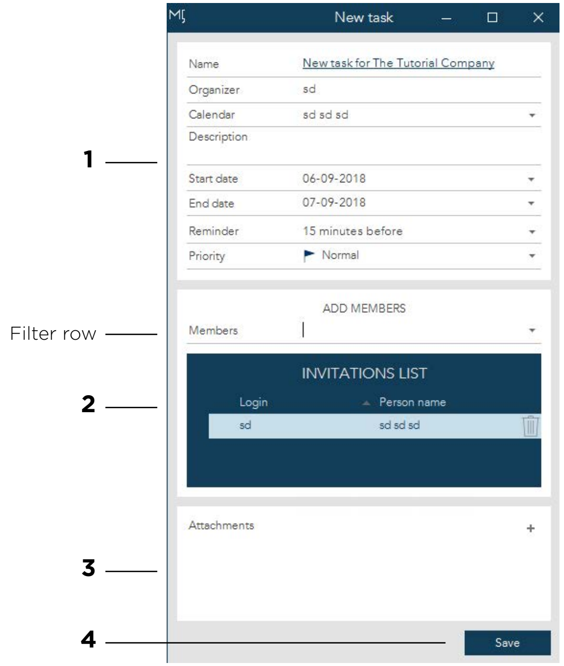
1.3.1 | Button functionality in Contact view

The following will go though the buttons **new email**, **new appointment** and **new task** located in the contact view (see chapter 1.3).

If you click the **new email** button in the **contact view** a pop-up will open. In this pop-up you can write an email, and the contact you were viewing will automatically be set in as the receiver. Now, compose the email you wish to send to the contact and press **send** when you are done.







If you click the new appointment button in the contact view a pop-up will open:

1 | The top section is where you can edit details about the appointment: its name, description, time and date, location and so on.

2 | The bottom section is where you can edit and see the participants. Your chosen contact will automatically appear in the invitation list. You can add participants to the list, either by selecting from the list or typing in the filter row. These will be added to the invitation list.

3 | Press send invitation when you are done and save.

If you click the new task button in the contact view a pop-up will open:

1 | The top section is where you can edit details about the task; the name, start and end date, set a reminder and a priority. The name of the task will automatically be set as "New task for [the contacts' name]".

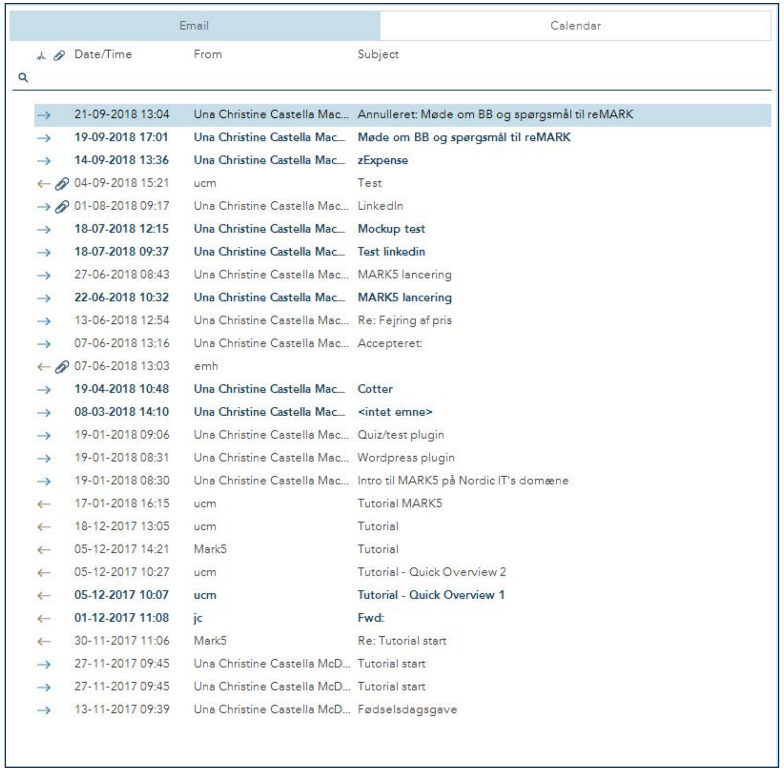
2 | The next section is where you can add members to the task. You can add participants to the list, either by typing in the filter view row or tap the small arrow at the right in the filter row, and select from the list. When you have added a member, you will see them in the invitations list. To delete a member again, mouse over the contact, and tap the trashcan icon to remove.

3 | In this area you can add an attachment to the task. Click the **+** icon at the right, and you will be able to add an attachment from you desktop.

4 | Once you are done, press Save.

1.4 | Related activity

The last pane is related activity. Here you can view emails and calendar events related to the contact you are viewing.


Email Calendar

Date/Time	From	Subject
21-09-2018 13:04	Una Christine Castella Mac...	Annulleret: Møde om BB og spørgsmål til reMARK
19-09-2018 17:01	Una Christine Castella Mac...	Møde om BB og spørgsmål til reMARK
14-09-2018 13:36	Una Christine Castella Mac...	zExpense
04-09-2018 15:21	ucm	Test
01-08-2018 09:17	Una Christine Castella Mac...	LinkedIn
18-07-2018 12:15	Una Christine Castella Mac...	Mockup test
18-07-2018 09:37	Una Christine Castella Mac...	Test linkedin
27-06-2018 08:43	Una Christine Castella Mac...	MARK5 lancering
22-06-2018 10:32	Una Christine Castella Mac...	MARK5 lancering
13-06-2018 12:54	Una Christine Castella Mac...	Re: Fejring af pris
07-06-2018 13:16	Una Christine Castella Mac...	Accepteret:
07-06-2018 13:03	emh	
19-04-2018 10:48	Una Christine Castella Mac...	Cotter
08-03-2018 14:10	Una Christine Castella Mac...	<intet emne>
19-01-2018 09:06	Una Christine Castella Mac...	Quiz/test plugin
19-01-2018 08:31	Una Christine Castella Mac...	Wordpress plugin
19-01-2018 08:30	Una Christine Castella Mac...	Intro til MARK5 på Nordic IT's domæne
17-01-2018 16:15	ucm	Tutorial MARK5
18-12-2017 13:05	ucm	Tutorial
05-12-2017 14:21	Mark5	Tutorial
05-12-2017 10:27	ucm	Tutorial - Quick Overview 2
05-12-2017 10:07	ucm	Tutorial - Quick Overview 1
01-12-2017 11:08	jc	Fwd:
30-11-2017 11:06	Mark5	Re: Tutorial start
27-11-2017 09:45	Una Christine Castella McD...	Tutorial start
27-11-2017 09:45	Una Christine Castella McD...	Tutorial start
13-11-2017 09:39	Una Christine Castella McD...	Fødselsdagsgave

In the email tab you can see emails related to the contact you have chosen from the contact list. From the filter row you can make quick searches according to date/time, who the email is from and the subject of the email.
Double-click on an email if you wish to view it. Right-click if you wish to carry out actions.

1.4 | *Related activity*

In the calendar tab you can see appointments and tasks related to the chosen contact.

The filter row consists of different information related to the appointments and tasks on the list:

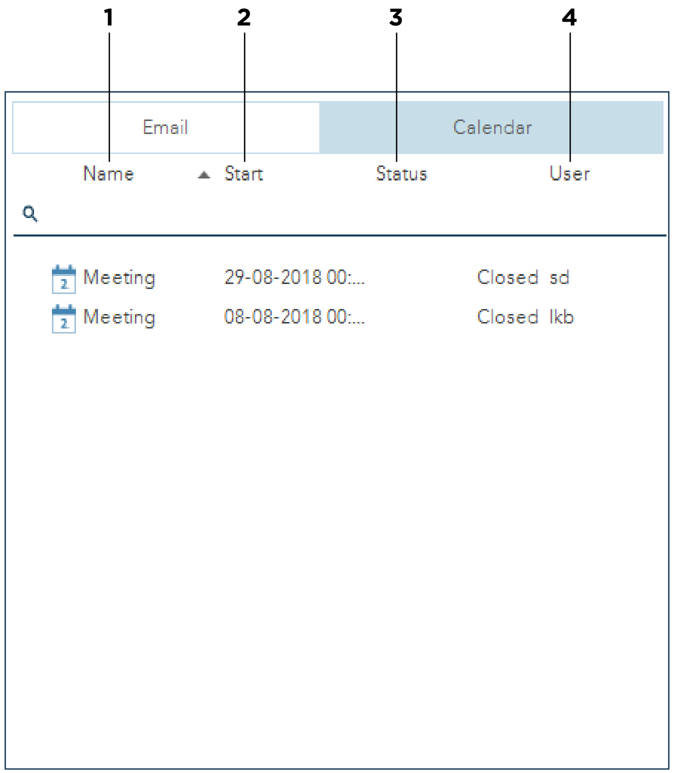
1 | Under the row name, you can see the name of the appointment.

2 | Start shows you when the appointment takes place.

3 | Status show you if the appointment is closed, in the future, or happening now.

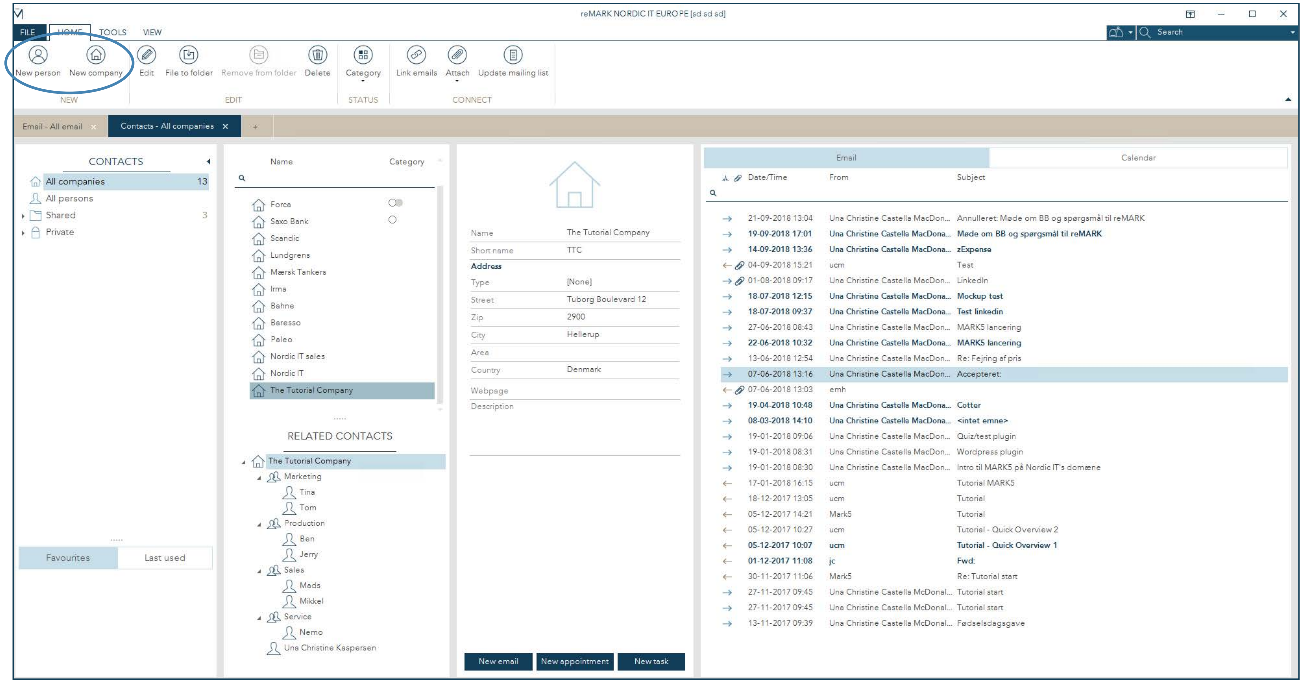
4 | User shows you who has created the appointment or task.

Double-click on an appointment or task from the list to open a window with more details.



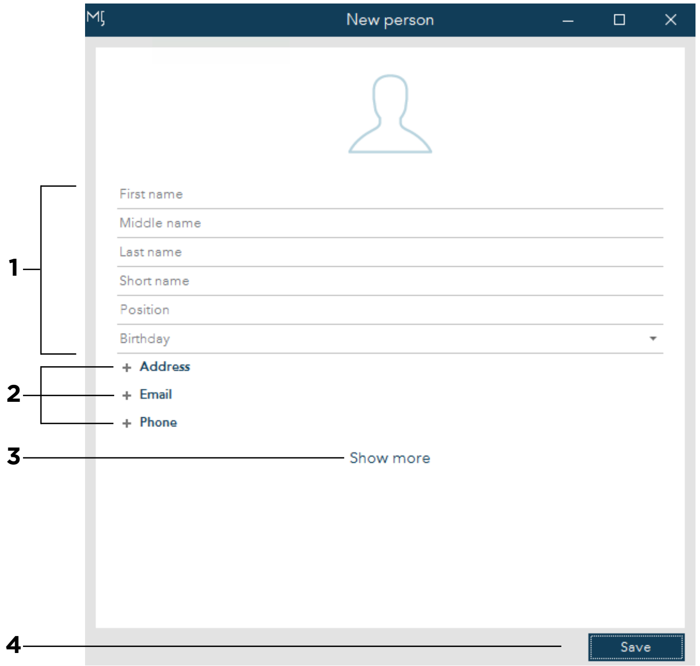
2.0 | Create new contact

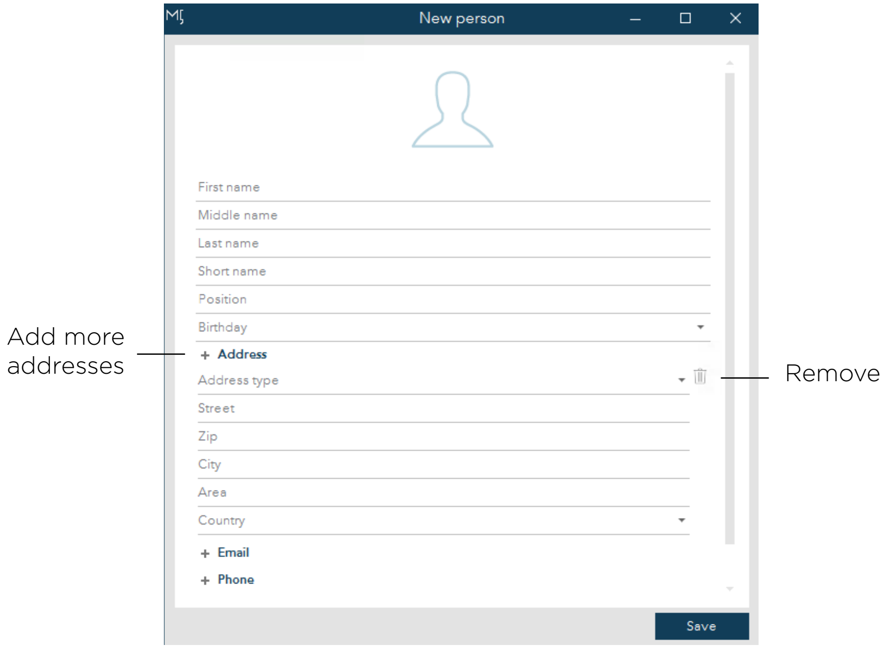
If you wish to create a new contact, you have to decide whether the contact should be registered as a person or a company. Both options are placed in the toolbar under the home tab.



2.1 | Create new person

When you tab new person from the toolbar a new window will appear.



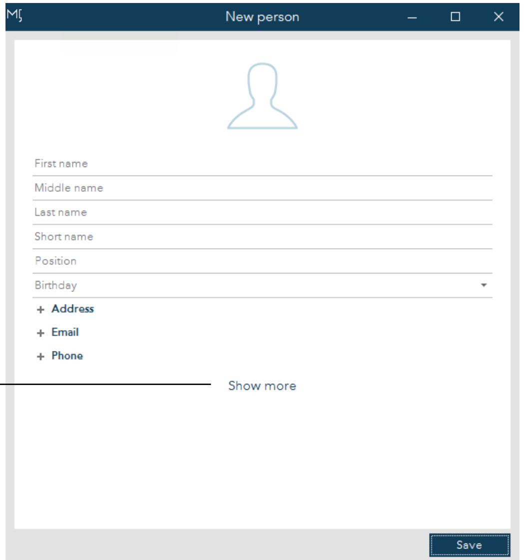


1 | First, you need to define the name of the contact. In short name you can put in the initials of the person. This will be visible in related activity whenever the contact has created a task or an appointment. You can also fill out the job position of the contact, as well as the birthday. To do the latter, click the small arrow to the right.

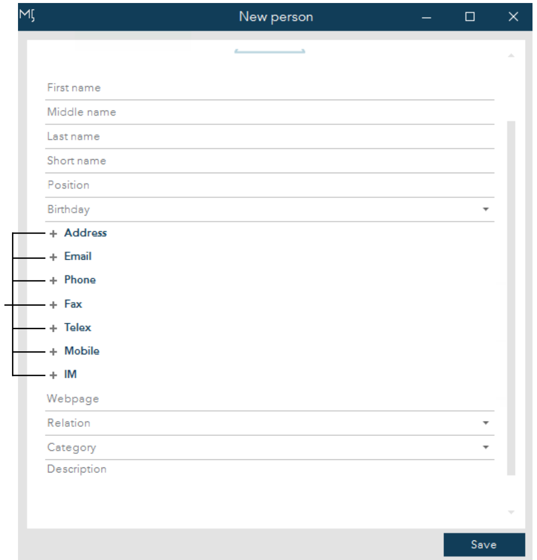
2 | In this area you see the contact information that can be added to the contact. Click the **+** sign next to either address, email or phone, and new options will appear.

In the screenshot above, address have been clicked. You will now see more options to fill out.
You also have the option of adding several addresses. Just click the heading with the **+** sign again, and an extra area will be added.
To remove an area again, click the small trashcan icon.

3



Click to add



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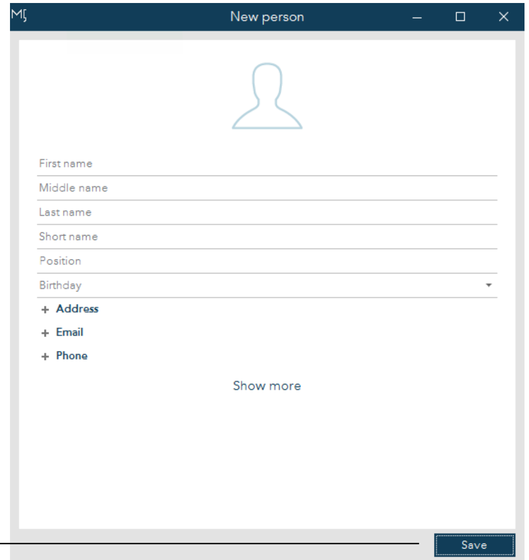
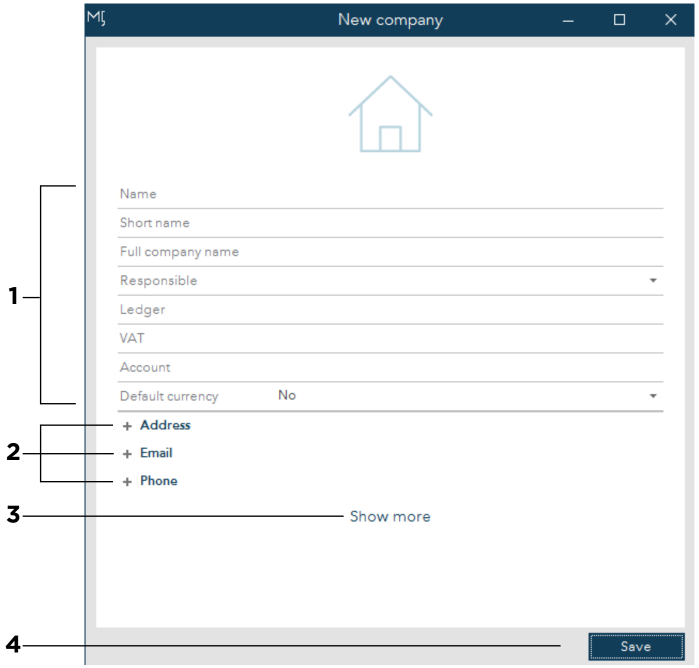


3 | If you wish to add the contact information fax, telex, mobile or IM click show more and more options will appear.

4 | When you are done, click save. Now, you can find the contact in the contact list from the group; all persons (see chapter 1.1).

2.2 | Create new company

To create a new company, click new company from the toolbar (see chapter 2.0). This will open a pop-up quite similar to the one we just went through in chapter 2.1.



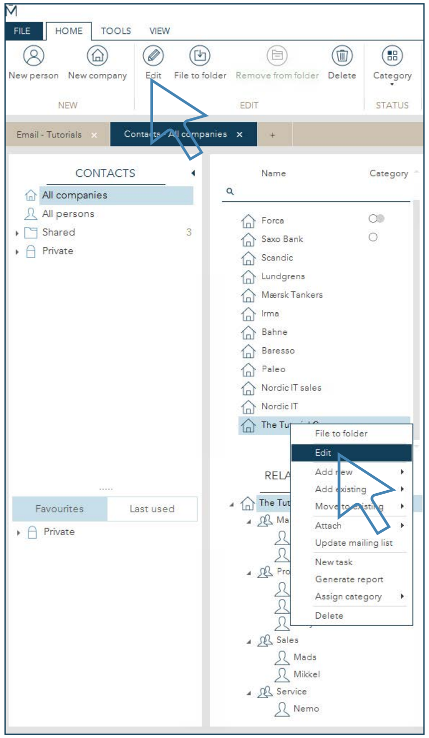
1 | First you need to add the basic details of the company. Enter the name of the company, and a short name that will be visible e.g. when the company has created an appointment or a task.
Now add a person who is responsible for the company.
You can also add the company's ledger, VAT number, account and default currency.

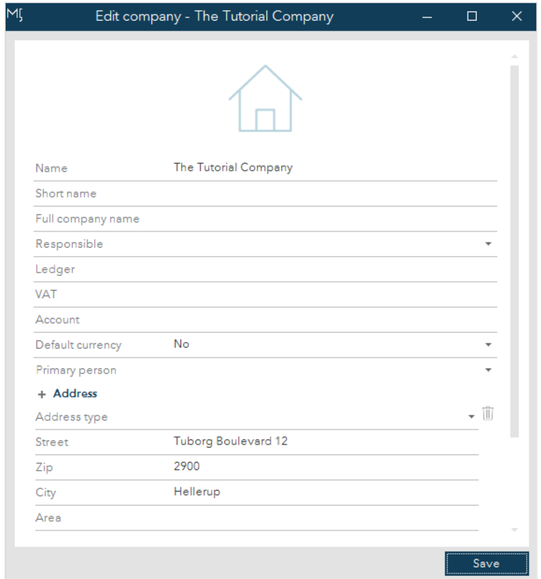
2 | Use the **+** signs to add more information to the company. This is the same procedure as descriped in chapter 2.1.

3 | You can also access more options by tapping show more.

4 | When you are done, click save.

2.3 | Edit contact



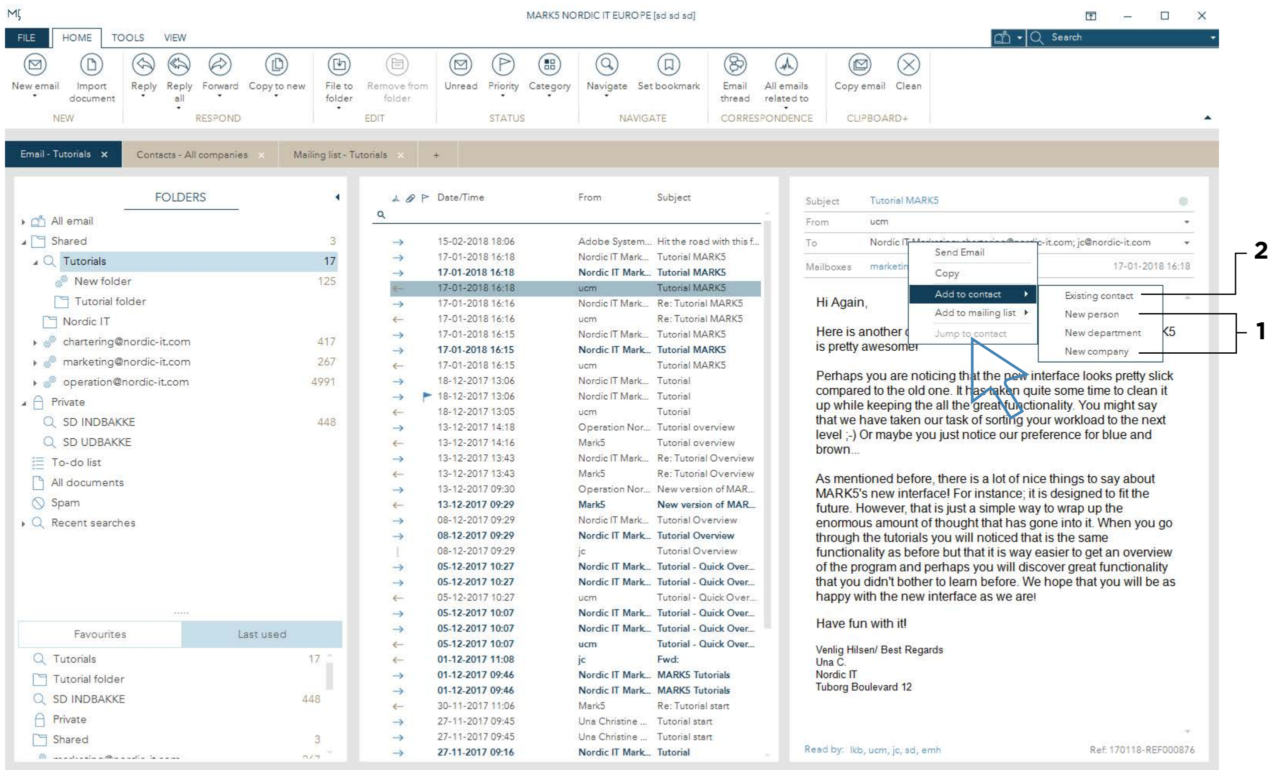


To edit a contact, first, make sure to mark the contact you wish to edit from the contact list, and then click edit in the toolbar. You can also right-click on the contact and click edit from the dropdown or by double-clicking on the chosen contact. This will open the edit pop-up window.

The edit window is similar to the create window.
Here you can edit or add the details you wish using the same method as when you were creating a new contact (see chapter 2.1 or 2.2).
When you are done, click save and your adjustments will be added to the contact.

2.4 | Add contact directly from email

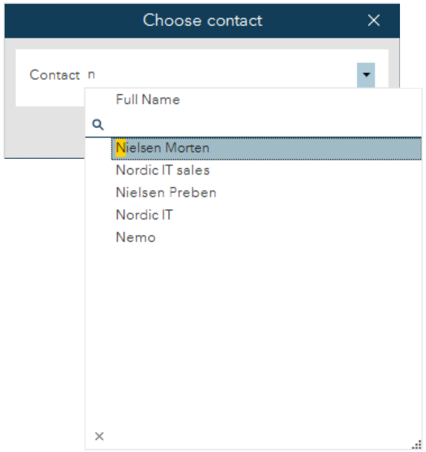
When viewing an email, you can add an email address to your contacts directly from the email. Right-click the email address you wish to add and a dropdown will appear:

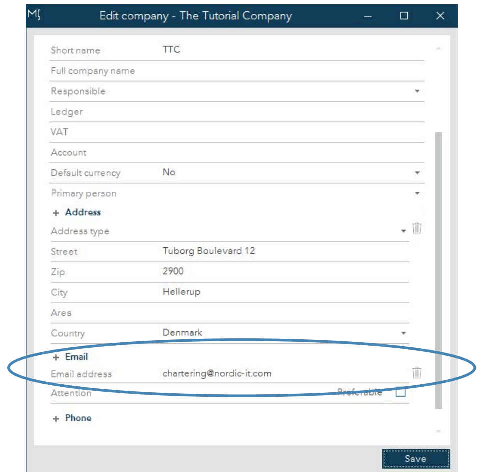


From here, put your mouse on add to contact, and more options will appear. Here you can add the email to an existing contact or create a new contact.

1 | If you choose either new person or new company a pop-up will appear where you should follow the procedure from chapter 2.1 for person or 2.2 for company.

2 | If you choose to add the contact to an existing contact, you will see a pop-up similar to this:





Here, you can either tap the small arrow on the right and you will see a dropdown of your existing companies that you can browse through to find the one you are searching for.
You can also tap the blank space and type in the name of the company you wish to add, and when you see it in the dropdown, double-click it. When you are done, click OK.

Now, the edit company window will open and you will see that the email address has been added under
+ Email.
Click save, and the email address will be added to the chosen company.