

This guide covers how to find, edit, delete and add contacts.

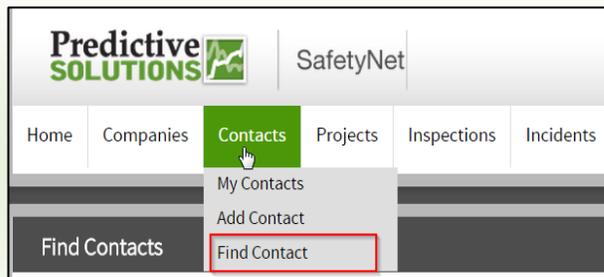
Covered Topics:

- Find a Contact
- Edit a Contact
- Delete a Contact
- Add/Create a Contact

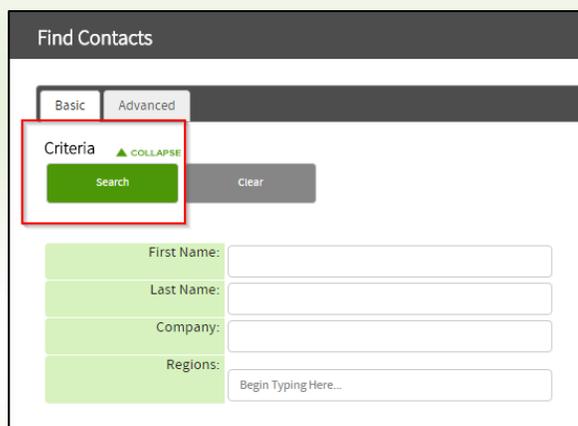
Find a Contact

1. Go to the Contact menu and select Find Contact on the Home Page:

Note: My Contacts tab (This is a favorites list for quick reference)



2. You may search contacts by First Name, Last Name, Company, and Region. For additional search options, use the Advanced tab of the search criteria.
3. Enter your desired search criteria and click the Green “Search” button.



4. Below is an example of the types of results you should see when searching for contacts:

Executed new search info		Displaying 342 of 342 records						
	Name	Company	Position	Email	Work	Cell	Fax Number:	Designee
<input type="checkbox"/>	Angela Bassett	Giant Construction	Safety Manager		650-587-0101			true
<input checked="" type="checkbox"/>	Kathy Bates	Giant Construction	Elect. Superintend...	dbo2@dbo2.com	650-587-0101			false
<input type="checkbox"/>	Nick Beck	American Stone Virginia		nick.beck@asiprecast...				false
<input type="checkbox"/>	Annette Bening	Giant Construction	Safety Manager	dbo2@dbo2.com	650-587-0101		512-538-2459	true
<input type="checkbox"/>	Halle Berry	Giant Construction	Superintendent	dbo2@dbo2.com	650-587-0101			false
<input type="checkbox"/>	Gary Beswick	TESTERS		null				false
<input type="checkbox"/>	Mohideen Bilal	Giant Construction		mbilal@indsci.com				false
<input type="checkbox"/>	Juliette Binoche	Giant Construction	Assistant superintendent	dbo2@dbo2.com	650-587-0101			false
<input type="checkbox"/>	Cate Blanchett	Giant Construction	Safety Manager	dbo2@dbo2.com	650-587-0101			true

Edit a Contact

1. Clicking on the desired Contact's name will lead to the contact details page.

NOTE: Line will be highlighted in dark green and become bold while hovering over with the pointer

Executed new search info		Displaying 342 of 342 records						
	Name	Company	Position	Email	Work	Cell	Fax Number:	Designee
<input type="checkbox"/>	Javier Bardem	Lions Electrical	Safety Coordinator	dbo2@dbo2.com	650-587-0101		650-551-1459	false
<input type="checkbox"/>	Marie-Christine Barrault	Giant Construction	Project Manager	dbo2@dbo2.com	650-587-0101			false
<input checked="" type="checkbox"/>	Angela Bassett	Giant Construction	Safety Manager		650-587-0101			true
<input type="checkbox"/>	Kathy Bates	Giant Construction	Elect. Superintendent	dbo2@dbo2.com	650-587-0101			false
<input type="checkbox"/>	Nick Beck	American Stone Virginia		nick.beck@asiprecast...				false
<input type="checkbox"/>	Annette Bening	Giant Construction	Safety Manager	dbo2@dbo2.com	650-587-0101		512-538-2459	true
<input type="checkbox"/>	Halle Berry	Giant Construction	Superintendent	dbo2@dbo2.com	650-587-0101			false

2. Edits can include updating name, contact information, region, company and/or the contact's Notification & Inspector Flag Matrix

Notification and Inspector Flags

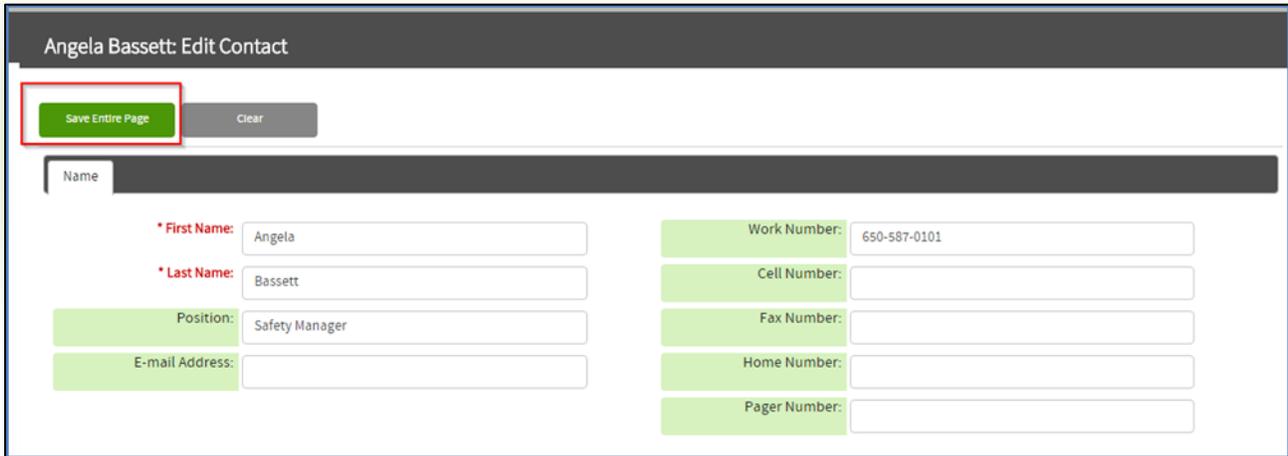
Select project notifications (alerts and reports) by using the Flag Status dropdown list. You can show or hide your current selection(s) by clicking on "Show/Hide Flag Matrix." Click on "Additional Project Notifications" to select projects for which you would like to receive all notifications.

* Flag Status: Custom ▼ Show Flag Matrix Additional Project Notifications

For more details, please see the following Edit Contact – Flag Matrix User Guide:

[Edit Contact - Flag Matrix User Guide](#)

3. Make the necessary changes and click on the Green “Save Entire Page” button.



Angela Bassett: Edit Contact

Save Entire Page Clear

Name

* First Name: Angela

* Last Name: Bassett

Position: Safety Manager

E-mail Address:

Work Number: 650-587-0101

Cell Number:

Fax Number:

Home Number:

Pager Number:

Delete a Contact

1. Follow the steps above for finding a Contact. Then Check the box to the left of the Contact and click the RED Delete button at the top right hand of the page.

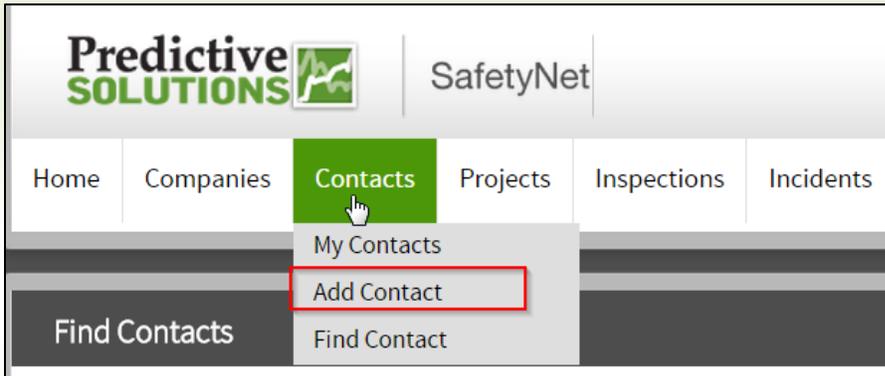
Executed new search [info](#) Displaying 342 of 342 records

	Name	Company	Position	Email	Work	Cell	Fax Number:	Designee
<input type="checkbox"/>	Javier Bardem	Lions Electrical	Safety Coordinator	dbo2@dbo2.com	650-587-0101		650-551-1459	false
<input type="checkbox"/>	Marie-Christine Barrault	Giant Construction	Project Manager	dbo2@dbo2.com	650-587-0101			false
<input checked="" type="checkbox"/>	Angela Bassett	Giant Construction	Safety Manager		650-587-0101			true
<input type="checkbox"/>	Kathy Bates	Giant Construction	Elect. Superintendent	dbo2@dbo2.com	650-587-0101			false
<input type="checkbox"/>	Nick Beck	American Stone Virginia		nick.beck@asiprecast...				false
<input type="checkbox"/>	Annette Bening	Giant Construction	Safety Manager	dbo2@dbo2.com	650-587-0101		512-538-2459	true
<input type="checkbox"/>	Halle Berry	Giant Construction	Superintendent	dbo2@dbo2.com	650-587-0101			false

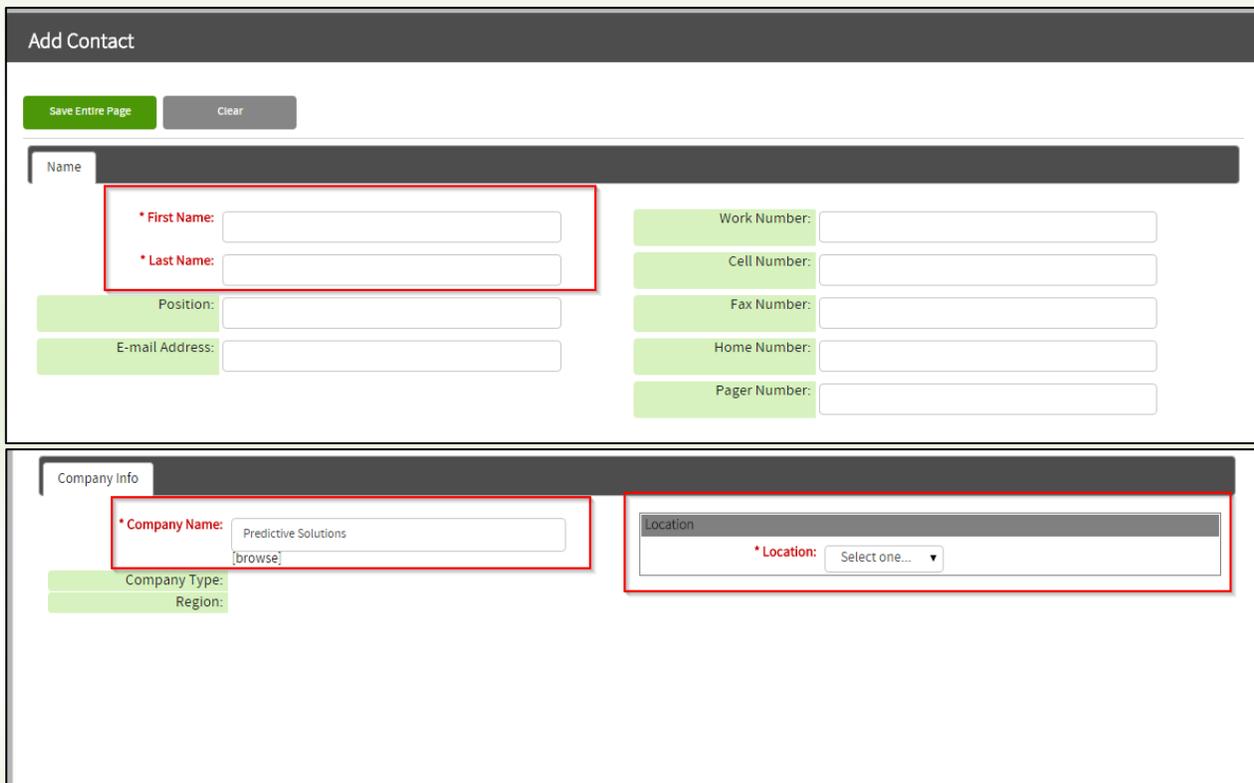
*** **Important** – Deleting a Contact creates significant data discrepancies. If you have two or more identical Contacts do not delete them. Instead, your account administrator should use the Merge record option from the Administration menu***

Create/Adding Contacts

1. Go to the Contact menu and select Add Contact.



2. Creating a contact has 4 required fields – First Name, Last Name, Company and Location. Enter the contact information and click the Green “Save Entire Page” button. *NOTE: Setting up observers – Contact must have the flag matrix set up properly and be associated as a team member on project(s) where observations will be collected. See the [Edit Contact – Flag Matrix User Guide](#) & [Adding Team Members to Project/Location Video](#) for further instructions.*



Add Contact

Save Entire Page Clear

Name

* First Name:

* Last Name:

Position:

E-mail Address:

Work Number:

Cell Number:

Fax Number:

Home Number:

Pager Number:

Company Info

* Company Name: [browse]

Location:

Company Type:

Region: