# Manage Contacts

☐ **How to access it**

The user can access from the top of the main menu: **"Contacts"**. Contacts are listed in the alphabetical order of the first name by default.

☐ **Add/Edit a Contact**

Adding a Contact can be done from the Quick Add drop-down.



The only mandatory fields have asterisks next to them in red.

After adding a Contact, it will be designated with a **Contact #** that is automatically generated by the system. Once the user clicks on the Contact # from the grid, the Contact form opens where the user can be view/edit the Contact data. The edit form of the Contact can be in an inline form or in an edit form.

A Contact profile has plenty of information to be tracked such as Foreign Name, Father's Name, one or more Nationalities, Email, Mobile, Phone, Fax. You can edit information regarding the Contacts' job details, address, and personal information. There is also a custom field section, in which we can add additional fields if needed. These fields can be of type text, date, or even a dropdown list of values.

At the end we have a text box for any comments.

You can also:

- Relate a Contact to one or more Companies.
- Precise if he/she is a Lawyer for better tracking of data.
  - When the field "*Is Lawyer*" is checked, it means that the Contact in question is a Lawyer.
  - When the field "In-house *Lawyer*" is checked, it means that the contact in question is a Lawyer within a Legal Department or a Corporate Lawyer.
- Categorize Contacts: You can configure the Categories that you would like to see in App4Legal. Categories can also be **added on the fly** using the plus sign next to the Category field.
- Relate Documents
- Relate Contacts to another one.
- Visualize all the Related Matters of a Contact through the Related Matters tab.
- Visualize all the related Contracts & Related Reminder of a contact through the Related Contracts & Related Reminders tabs.
- Set Contact as Private: A Contact can be marked as **Private.** The user who is also the creator of the Contact, once he/she flags the Contact as Private, he/she shall be the only owner of this Contact. The Contact could also be Shared with specific users. Users who are marked to Override Privacy will be able to see any Private object in App4Legal.

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☐ **Add Configurations on the fly**

All drop-down lists in App4Legal are configurable through the Settings. Luckily, some configurations can be configured on the fly. For instance, in the Contact form, a user is adding data and wants to have a new Contact Sub-Category swiftly. There is a blue plus sign that can assist the user to add a new value to the Contact drop-down list on the fly.

**Add Contact**                                                                          ✕

| Title | None ▾ |
|---|---|
| First Name* | |
| Last Name* | |
| Middle Name | |
| Category* | |
| Sub-category | |
| Company / Group | |

**Add Contact / Company Sub-category**                        ✕

Type*

[                                        ]

**Save**                                          Cancel

| Job Title | |
| Email | |

Use semicolons separator (;) to add multiple emails: for ex. john@gmail.com;john@live.com

| Phone | |
| Mobile | |

**Save** ▾                                                              Cancel

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☐  **Import a List of Contacts**

Users who are new comers to the application are prompted to import Contacts when they first access the Contacts grid.

At any time, a list of Contacts can be imported to the system via the import Wizard. From the Tools drop-down list on the top right of the Contacts grid

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Manage Filters

Import Contacts

or go to the Settings, Import data Section.

## Import Data

- Companies
- Contacts
- Corporate Matters
- Intellectual Properties
- Litigation Cases
- Matter Containers
- Tasks

Choose import Contacts.



Manage Filters

Import Contacts

Download the template and fill in the data. Make sure that there is no duplication of the combination of the First & Last Name of a Contact. Upload the excel sheet again to the system and click on Import.



Manage Filters

Import Contacts

The system will give you the total number of imported Contacts . Ignored Contacts that are not imported for any reason are put in a different excel sheet called Ignored Contacts that the user can download. Problems with the import are either with duplication, variation of the template or missing mandatory columns.

Mistakes can be corrected and the excel sheet can be imported again successfully.

- ☐ **Clone a Contact**

Cloning a Contact will add another Contact with the same data such as Company, Address and similar.

☐ **Delete Contact**

At any moment you can set a Contact as inactive provided that this Contact doesn't have any relation in other modules in App4Legal such as Reminders, Case etc.. The Contact also shouldn't be related to any Money object such as Client, Supplier or Partner.

Status ⬤

☐ **Manage Contact Custom Fields**

Visit the Configure Contacts page in the Settings.

☐ **Relate Documents**

The user can relate Documents to a Contact such as ID card, Passport Scan, Picture, Proxies, Legal Documents etc.. Documents can be arranged in folders. Privacy can also be applied on a folder and the privileged user can control with whom to share the file.

Files and Folders can be Categorized by Type, Status and optional Comments. Document Type and Statuses are managed via the Settings.

| App4Legal Documents | Dropbox | URL's | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| PER00000003 | | | | | | | | | | |
| Search | | Save Cancel | | | | | | | | Actions ▾ |
| ☐ Actions ∨ | Name | ∨ Type | ∨ Status | ∨ Keywords | ∨ Size | ∨ Modified By | ∨ Modified On | ∨ Added By | ∨ Added On |
| 📁 | 🔒 ID | | | | | Garry Malbeck | 2019-04-18 19:51:41 | Garry Malbeck | 2019-04-18 17:51:16 |
| 📄 | Passport Copy.xlsx 🔗 | | | | 17.06 (KB) | Garry Malbeck | 2019-04-18 19:50:50 | Garry Malbeck | 2019-04-18 17:50:50 |

or by uploading the files via the action bottom.

Note that if a File/Folder is added/uploaded with spaces in its name, the system will automatically replace the spaces with underscore for technical reasons. After the File/Folder is added, they can be managed using the action wheel on the grid.

File/Folders can be

- Renamed
- Deleted
- Share With: Folder can be set as Private that means only the creator can see it and with chosen App4Legal Users if needed. Folders that are locked are designated with a lock sign. Users who are set to Override Privacy can see all Private objects on App4Legal.
- Copy Path: Folder/Files paths can be copied in order to be shared with colleagues for fast access.

As an alternative to manually adding Files/Folders, and if there's an already implemented Document Management System such as Network Drive or Web Drive, you may map a **URL** to the Company documents to any Network Drive or Web link.

- **Inline Edit of Office Documents:**

App4Legal's Documents module offers a very nice feature that allows the user through App4Legal to edit Office documents called document Editor. This feature is supported only on **IE 11.** All what the user has to do is click on Open in document Editor. The user can edit the Document and click Save, the Document will be saved directly in the Documents module.

If a user has the Document open and is editing it in the meantime, if another user tries to open the same Document the system will prompt a message informing the user that the Document is already in use.

☐ **Relate Contacts**

A relation between one Contact and another can be managed through the Related Contacts tab. The relation could be for any business need. In the Comment field, you can just click on it and add your Comment about the Relation for tracking.

☐

**Related Matters**
All the related cases to a Contact can are listed in the Related Matters tab. A Contact can be related to a matter by being a Client, Opponent or related in any other way with a specified role that the user chooses.

☐ **Search for a Contact**

You have 3 methods of search: Quick Search, Advanced Search and Universal Search:

- In **Quick Search**, from within the Contacts grid, you can type the First or Last Name of the Contact and hit Enter from your keyboard to generate your search results. Search can also be based on the email, phone number, mobile number, Related Company and more.
- Using **Advanced Search**, you can run your search on a specific field from the Contact form. You'll have the possibility also to modify the operator of search for each field (i.e. equal, begins with, contains, >, <, and more). The Advanced Search menu is hidden by default; you need to click on the link Advanced Search from the Contacts grid to view it.
- With **Universal Search**, you can type the name of the Contact and hit Enter from your keyboard to generate your search results. The Universal Search looks into all the App4Legal database.

☐ **Manage Filters on the grid**

App4Legal offers the ability to save predefined filters. For instance, a user uses the Advanced Search to apply a certain filter on Contacts in App4Legal database. The user wishes to apply this filter every time the grid was accessed. Managing filters is easy and is done via the Contacts grid.

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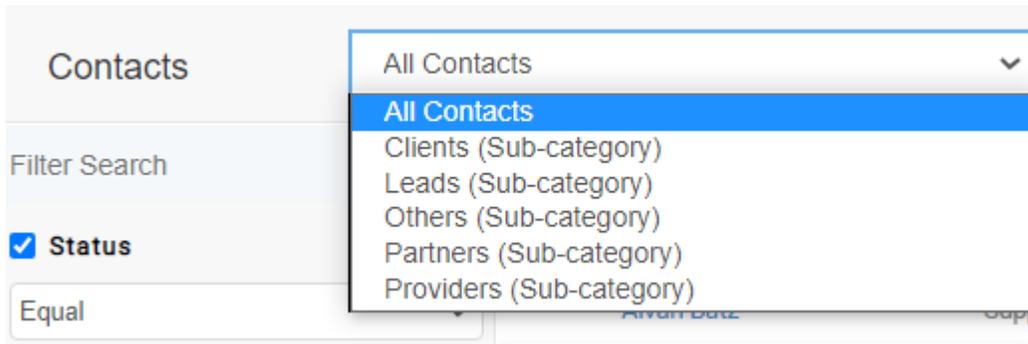


Managing filters is easy and is done via the Contacts grid.

Once any filter in the Advanced Search is applied, all what the user has to do is Add Filter. Then later on, whenever the Filter is chosen from the list of Filters, the Advanced Search filters automatically apply and the grid is filtered automatically.

If there is a need to edit or delete any Filter, click on Manage Filters.

☐ **Relate Reminders**

You may wish to relate a Reminder to a Contact at any time, you can directly go to the bell-shape icon on the top right of the screen, click on it. A list of pending Reminders will appear in case they are previously added. At the bottom of the list, there is an Add action.

The Add action will redirect the user to the Reminder add form.

Choose the Reminder Type and choose the desired Contact in the Related Contact section. For more info about the Reminders, visit the Manage Reminders page.

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☐ **Export to Excel**

The Contacts grid can be exported to an excel sheet at any moment via the Export button on the grid. Also, search results can be exported to an excel sheet separately.

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