

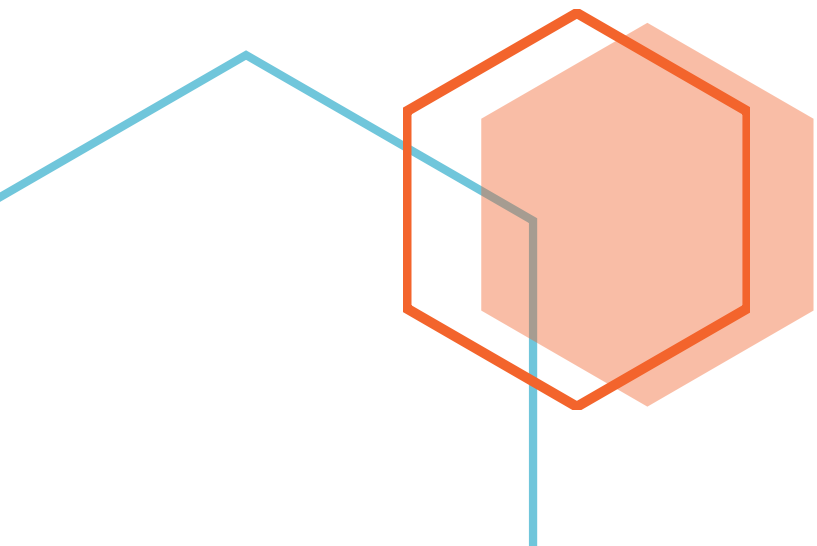


# Managing Contacts – Users Guide

---

## iOS AEGEA Mobile Application

This Users Guide will take you through the steps to add, edit, delete and view activities for a contact in the iOS AEGEA mobile application.





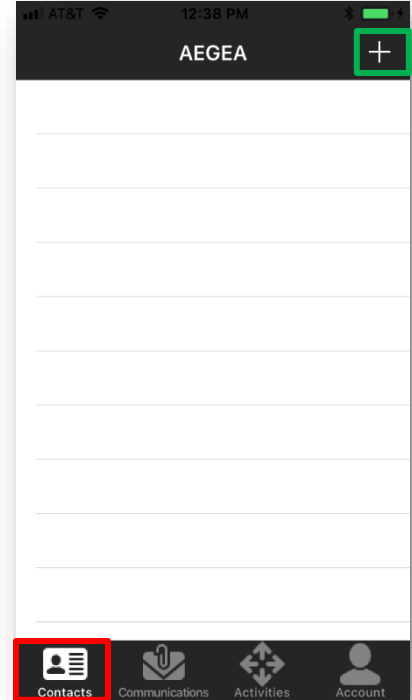
# Adding Contacts



### Adding Contacts – Contact Screen

To add a contact, you will first need to be on the Contacts Screen, highlighted by the red box in the image.

Next, you will need to select the “+” (plus sign), in the upper right corner of the application, highlighted by the green box in the image.



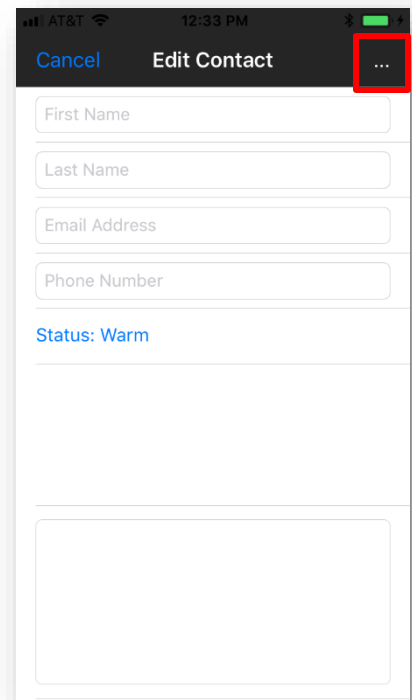
### Adding Contacts – Populating Information

There are two different ways to populate your contact's information on the Edit Contact Screen:

One, you can add information manually by typing into each field the contact's information.

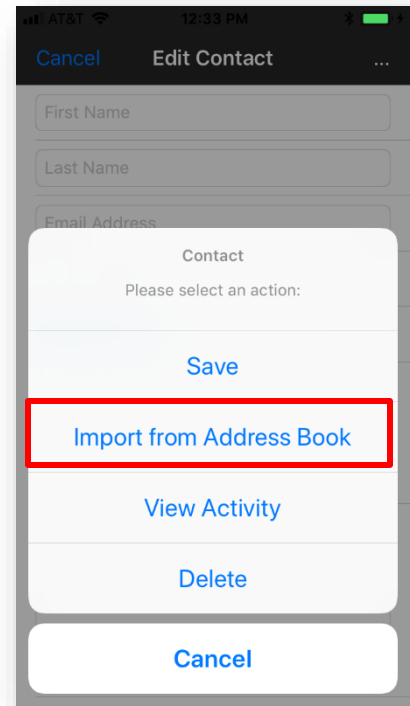
Two, you can use the Import from Address Book by selecting the ellipses in the upper right corner, highlighted by the red box in the image.

No matter what option you choose, please note that to Save a Contact, you must have a First Name, Last Name and Phone Number.





To import a contact from the address book, select the Import from Address Book menu option, highlighted by the red box in the image.

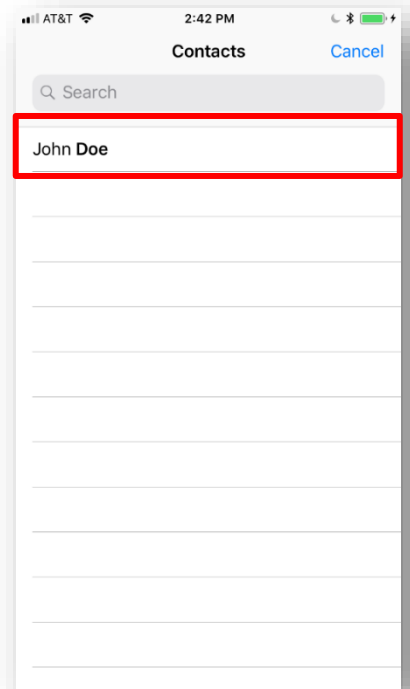


### *Adding Contacts – Import from Address Book*

After selecting the Import from Address Book menu option, your list of contacts will appear.

Note, you may need to give the application permissions to access your Contacts list. Without permission you will not be able to use the Import from Address Book.

To start the import process, select any Contact's name in the list. An example of selecting a contact is highlighted with a red box in the image.

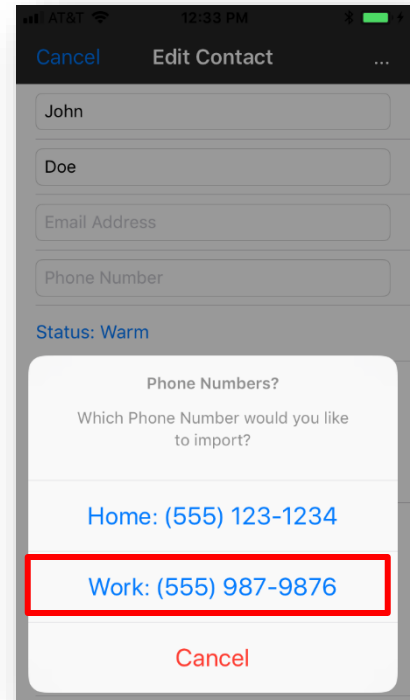




### Adding Contacts – Multiple Phone Numbers

When importing a contact from the address book, if the contact has more than one phone number associated with their contact information, you will see a list of the possible phone numbers, to select which phone number you want to import.

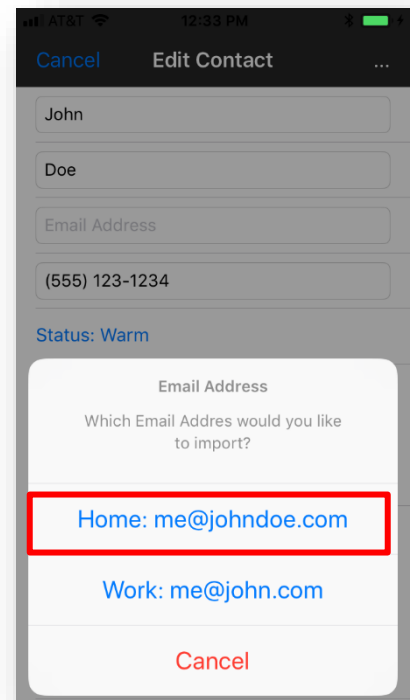
To import a phone number, select one of the phone numbers presents. An example of selecting a phone number is highlighted by a red box in the image.



### Adding Contacts – Multiple Email Addresses

When importing a contact from the address book, if the contact has more than one email address associated with their contact information, you will see a list of the possible email addresses, to select which email address you want to import.

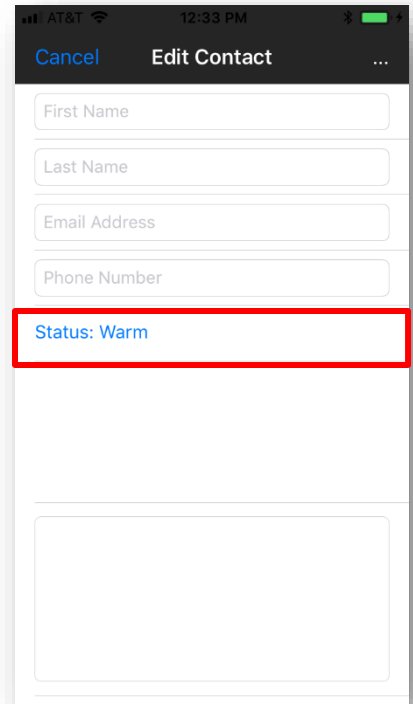
To import an email address, select one of the email addresses presents. An example of selecting an email address is highlighted by a red box in the image.



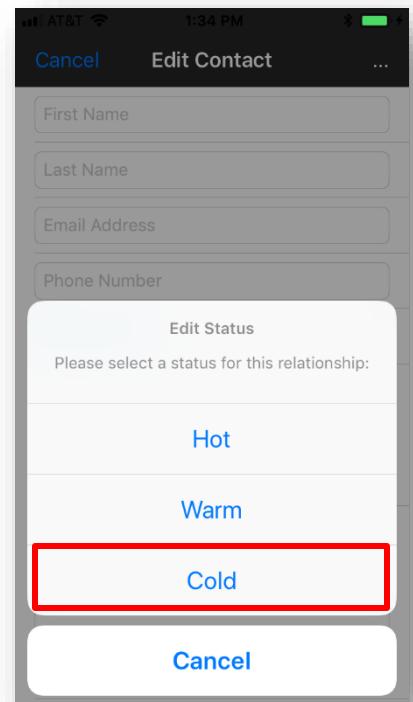


### Adding Contacts – Setting Status

To set the Status of a manual or imported contact, select the Status link, highlighted by a red box in the image.



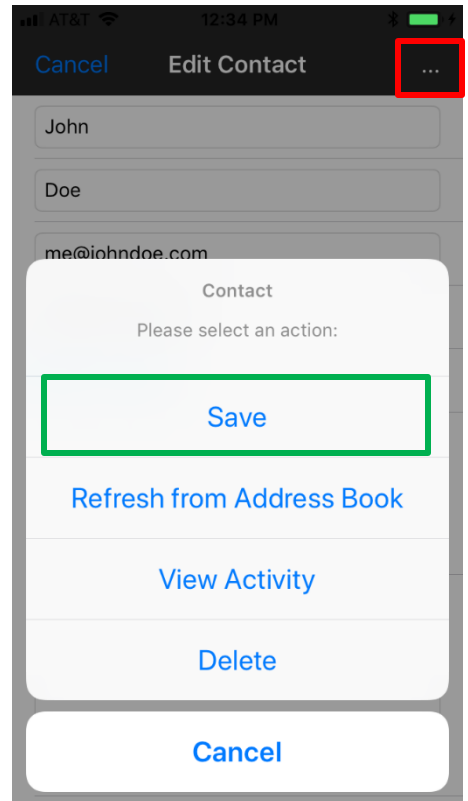
Selecting the information indicator, presents the list of choices for the Status field. To choose a value, select either Hot, Warm or Cold. An example of selecting a Status value is highlighted by a red box in the image.





### Adding Contacts – Saving the Contact

When you are done adding your contact, select the ellipses in the upper right corner, highlighted by the red box in the image, to show the actions menu, where you will be able to select the Save button, highlighted by the green box in the image.



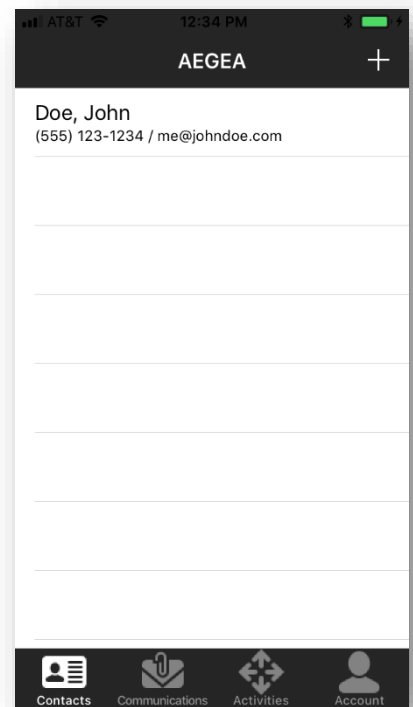
### Adding Contacts – Contact List

Once the added contact has been saved, you will be brought back to the Contact list.

If your added contact does not appear immediately, pull down on the list and the application will retrieve your list from the cloud.

Please note that all your data is backed up to the cloud, thus you need to have an internet connection, cellular data or Wi-Fi will work. Refreshing your data is dependent on how fast your internet connection is performing. Slower internet connections will take longer to refresh and show your Contacts list.

Selecting the plus sign again, will allow you to continue to add as many contacts as you would like.





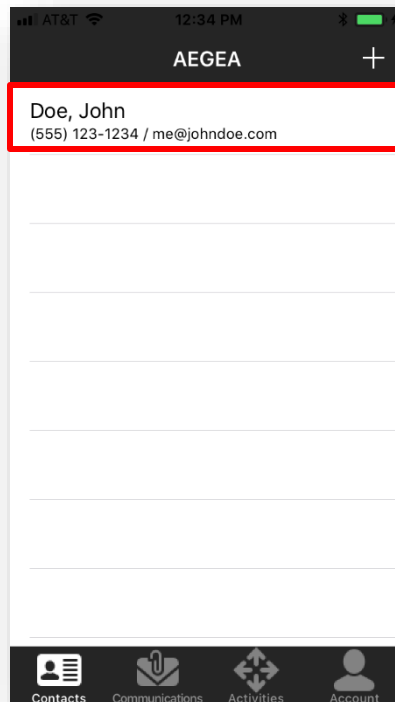
# Editing Contacts



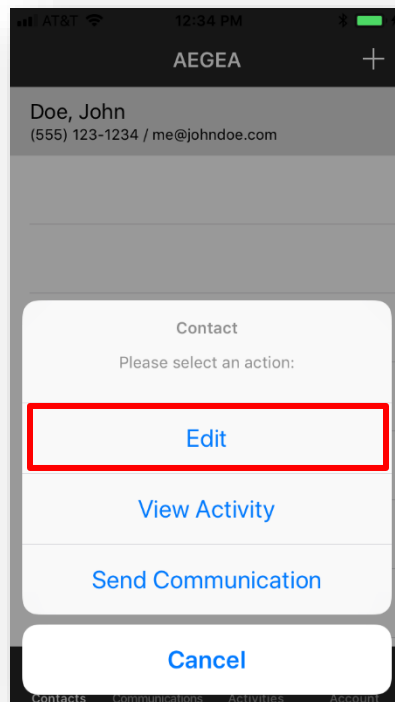


### Editing Contacts – Contact List

To edit an existing Contact, select the row of information, highlighted by the red box in the image.



Selecting the row information will open the edit contact menu where you can select to Edit, highlighted by the red box in the image.



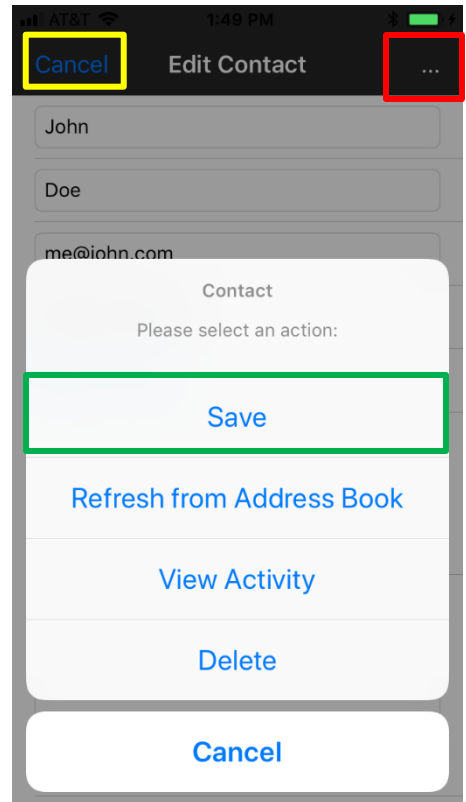


### Editing Contacts – Edit Contact Screen

To edit a contact, you can change the value of any field manually, or you can select to Refresh from Address Book.

Please note that you will not be able to save an edited contact without a First Name, Last Name and Phone Number.

When you are done editing the contact, you can select the ellipse, highlighted by the red box in the image, to display the action menu where you can select the Save button to keep your changes, highlighted by the green box in the image, or select the Cancel button to discard your changes, highlighted by the yellow box in the image.

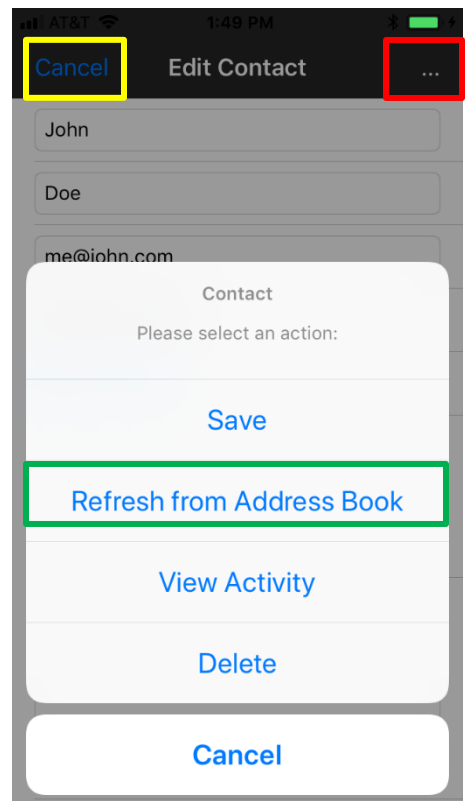


### Editing Contacts – Refresh from Address Book

To update a contacts information from the Address Book, select the ellipse, highlighted by the red box in the image, to display the action menu where you can select the Refresh from Address Book menu, highlighted by a green box in the image.

Much like adding a contact, your address book will appear with a list of contacts. Selecting a contact will bring the refreshing process. If the contact has more than one phone number, or email address you will be presented with options to select what item you want to refresh.

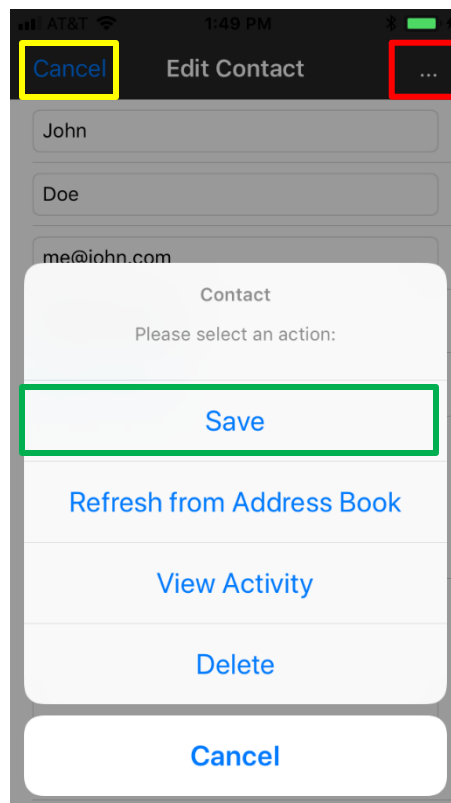
Please note, that refreshing a contact overwrites the current contacts information with the information from the address book. Any manual edits you have performed since the import will be lost during the refresh process. If you wish to cancel the refresh, simply select the Cancel button in the upper left corner of the application, highlighted by the yellow box in the image.





### Editing Contacts – Saving Edits

Once you are done editing and/or refreshing your contact's information, you can select the ellipse, highlighted by the red box in the image, to display the action menu where you can select the Save button, highlighted by the green box in the image, to keep your changes, or select the Cancel button, highlighted by the yellow box in the image, to discard your edits.



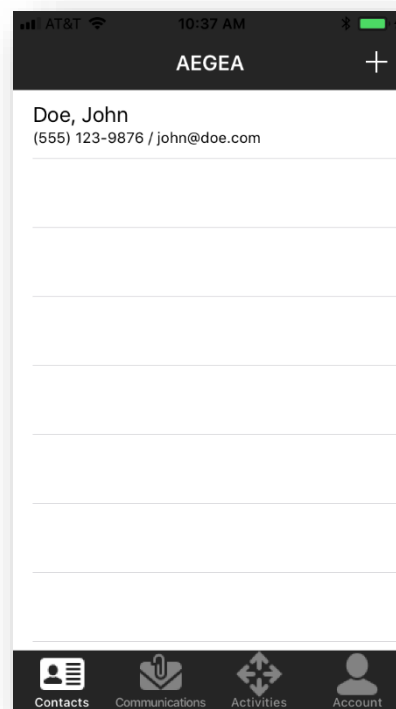
### Editing Contacts – Contact List

Once the edited contact has been saved, you will be brought back to the Contact list.

If your edited contact does not change immediately, pull down on the list and the application will retrieve your list from the cloud.

Please note that all your data is backed up to the cloud, thus you need to have an internet connection, cellular data or Wi-Fi will work. Refreshing your data is dependent on how fast your internet connection is performing. Slower internet connections will take longer to refresh and show your Contacts list.

Selecting another information indicator, will allow you to continue to edit as many contacts as you would like.

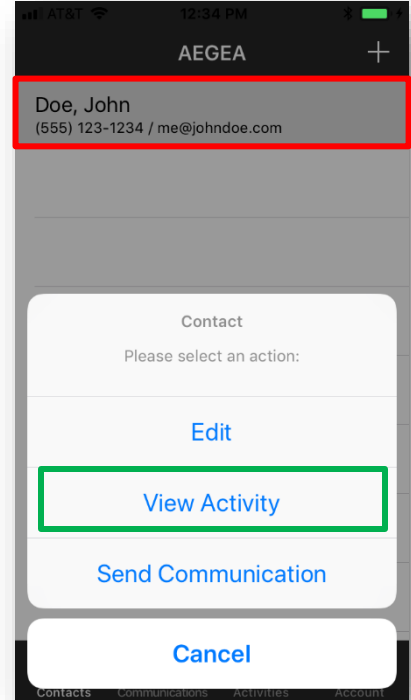




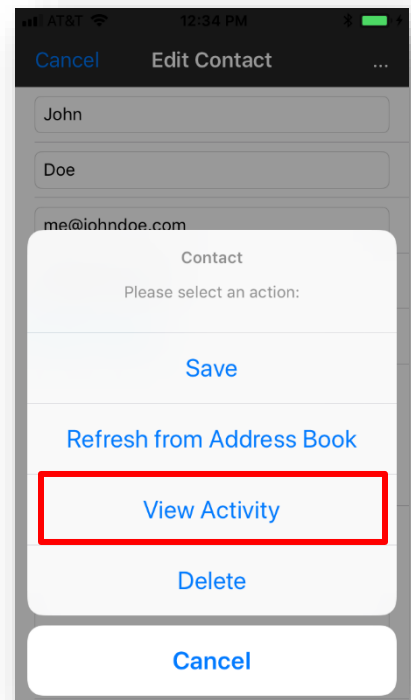
### Editing Contacts – View Activity

There are two ways to view any activity that has previously occurred for a contact.

One, from the contact list, by selecting the contact's information, highlighted by the red box in the image than an action menu will appear with the View Activity menu option, highlighted by the green box in the image.



Two, from the Edit Contact screen, to see a contact's activity, select the ellipses in the upper right corner and select View Activity, highlighted by the red box in the image, from the action menu that appears.

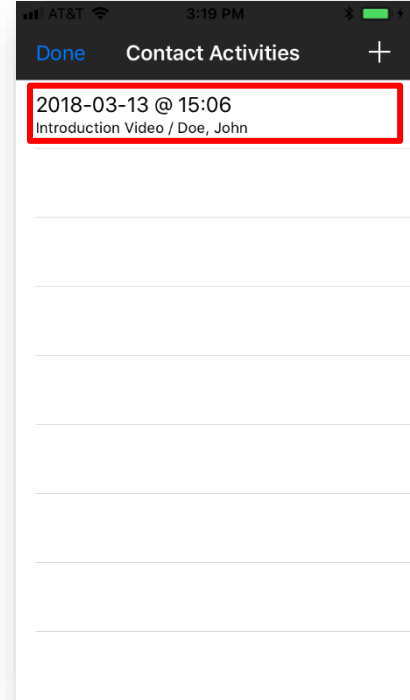




### Editing Contacts – Contact Activity List

Once the contact's activities list is viewed, you can view the details of any one activity or you can add a new activity.

To view an activity's details, select row with the activities information, highlighted by the red box in the image.



### Editing Contacts – Viewing Activities

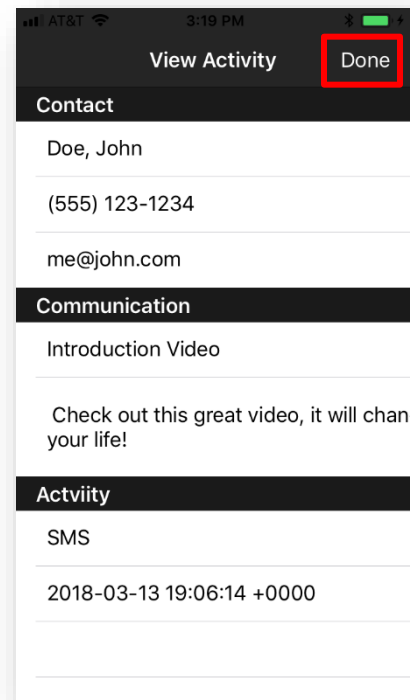
The View Activity screen shows you the details about each activity.

You will see the contact, exactly as it was sent in the activity. Even if you modified the contact after the activity was sent, the original information about the contact is preserved in the activity details.

You will see the communication, exactly as it was sent in the activity. Even if you modified the communication after the activity was sent, the original information about the communication is preserved in the activity details.

You will see details about the activity like how it was sent (SMS) and the date and time it was sent.

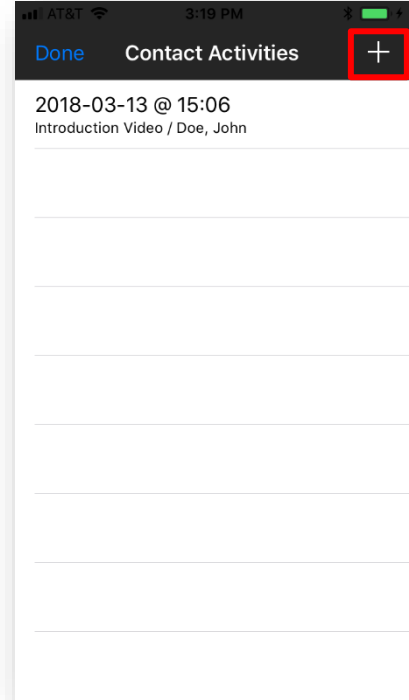
When you are done viewing the activity's details, selecting the Done button, highlighted by the red box in the image, will close the View Activity screen.





### *Editing Contacts – Adding Activity*

To add a new activity, select the “+”, plus sign, in the upper right corner of the application, highlighted by the red box in the image.



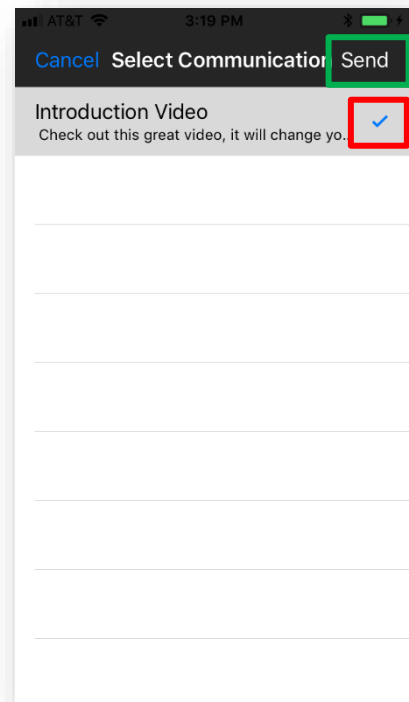
### *Editing Contacts – Adding Activity – Selecting Communications*

The first, and only step in adding activities to a contact is to select the communication you want to send.

Any communication previously added to the application will be listed and you will be able to select one communication.

The selected communication will be indicated by the checkmark on the far-right of the selected row, highlighted by the red box in the image.

Once your communication is selected, selecting the Send button, highlighted by the green box in the image, will take you to the sending activities process.





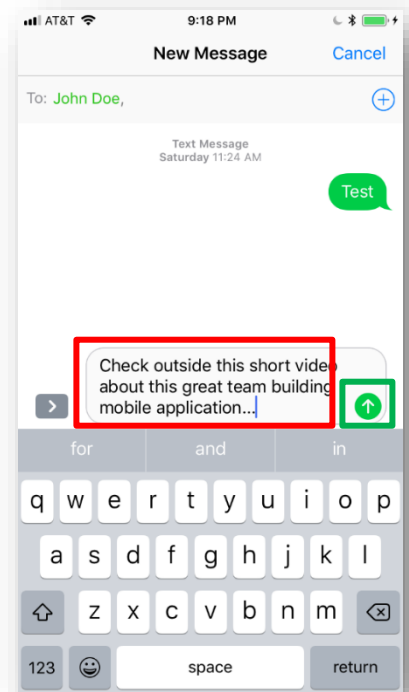
### Editing Contacts – Adding Activity – Sending Activities

Now that your communication and contacts have been selected, the application is ready to start sending your selected communication to each of your selected contacts.

The communication's message will be pre-loaded into the message area, highlighted by a red box in the image.

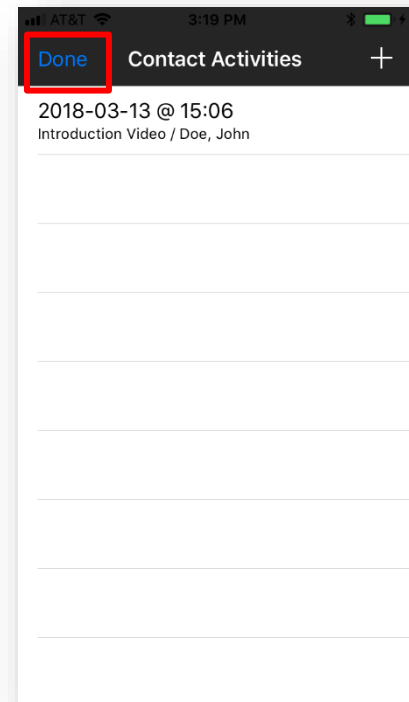
Selecting the sending button, indicated by the green circle with an arrow pointing up, highlighted by the green box in the image.

Once sent, the application will return to the Contact's View Activity list.



### Editing Contacts – Viewing Activities

When you are done with the Contact's Activities, select the Done button, highlighted by the red box in the image, in the upper left corner to return to the Contact List.





# Deleting Contacts

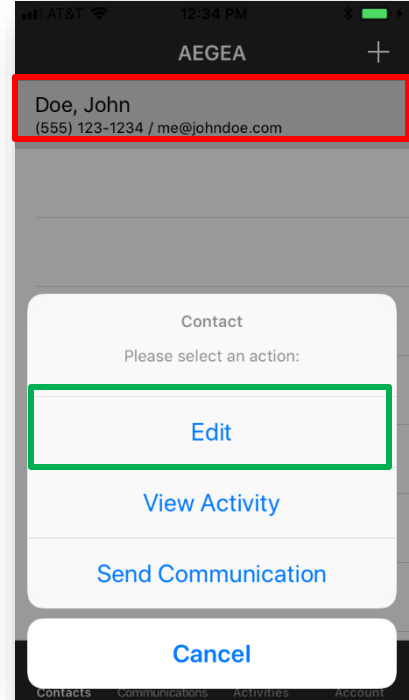




### *Deleting Contacts – Contact List*

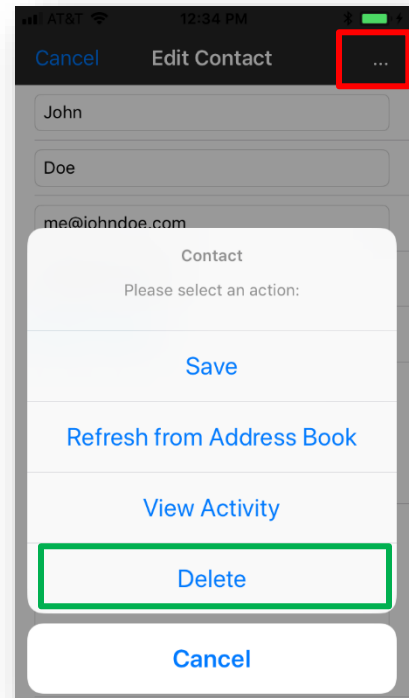
To delete a contact, you will first need to view its details.

To view a contact's details, select the row of information, highlighted by the red box in the image, to display the action menu where you can select the Edit menu option, highlighted by the green box in the image.



### *Deleting Contacts – Selecting Delete*

Once you have the Contact open for editing, you can delete the contact by selecting the ellipses in the upper right corner, highlighted by the red box in the image, then select the Delete menu option, highlighted by the green box in the image.





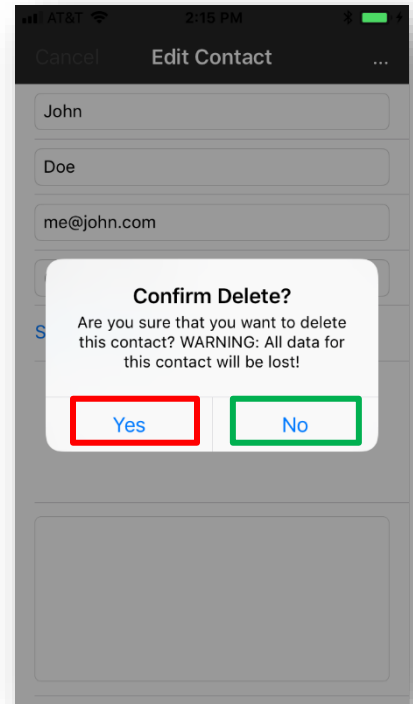
### Deleting Contacts – Confirming Delete

Once the Delete menu option is selected, you will be prompted to confirm your delete request.

To continue with the deleting process, select the Yes button, highlighted by the red box in the image.

To cancel the deleting process, select the No button, highlighted by the green box in the image.

Please note, that deleting a contact, will not delete any activities for this contact. You will always be able to see all activity, even if the contact has been deleted.



### Deleting Contacts – Contact List

If your deleted contact does not disappear immediately, pull down on the list and the application will retrieve your list from the cloud.

Please note that all your data is backed up to the cloud, thus you need to have an internet connection, cellular data or Wi-Fi will work. Refreshing your data is dependent on how fast your internet connection is performing. Slower internet connections will take longer to refresh and show your Contacts list.

