

How to Manage a Contact

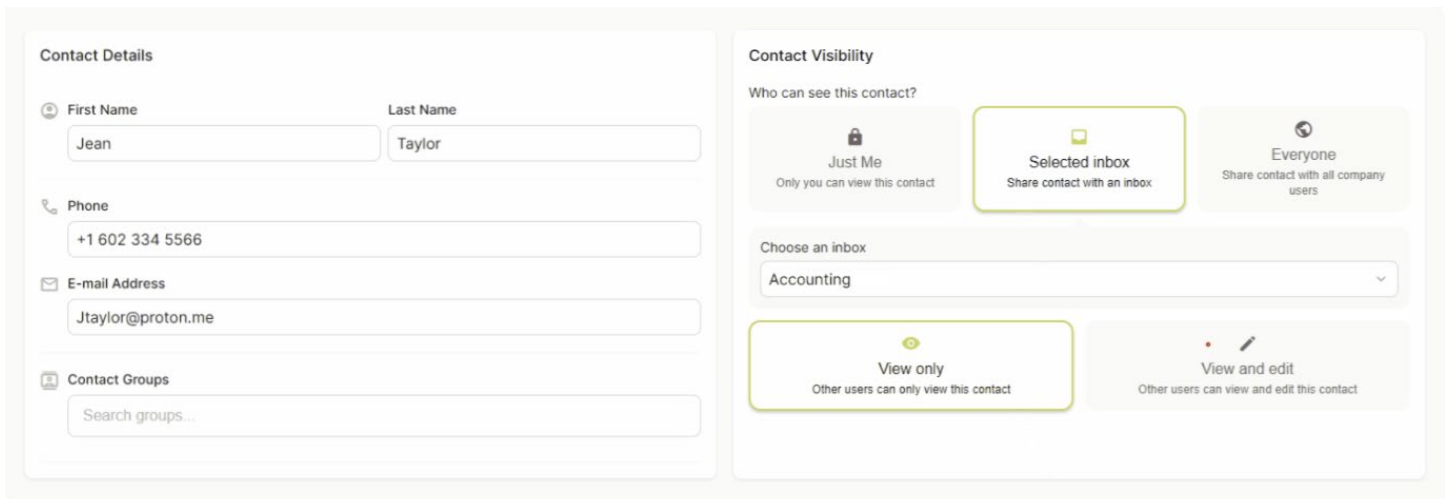


Note: Some of the actions to manage contacts require a level of rights and permission. If you do not have the ability to continue with any of the steps below, please reach out to your company admin.

Adding Contact

Option 1: Add Contact Via Contact Tab

1. Go to the Contacts tab, select the **+** button and then choose **New Contact**.
2. Once the contact form is displayed, you have to enter the following information
 - **First Name**
 - **Last Name**
 - **Phone Number**
 - **Email Address**
 - **Contact Groups**
3. Choose the contacts, sharing permissions to keep it private, to share with your chosen inbox, or to share with your entire company.



The screenshot shows the 'Add Contact' form. On the left, the 'Contact Details' section includes fields for 'First Name' (Jean), 'Last Name' (Taylor), 'Phone' (+1 602 334 5566), 'E-mail Address' (Jtaylor@proton.me), and 'Contact Groups' (Search groups...). On the right, the 'Contact Visibility' section asks 'Who can see this contact?' and offers three options: 'Just Me' (Only you can view this contact), 'Selected inbox' (Share contact with an inbox, highlighted with a green border), and 'Everyone' (Share contact with all company users). Below this, there is a 'Choose an inbox' dropdown menu set to 'Accounting'. At the bottom, there are two more options: 'View only' (Other users can only view this contact, highlighted with a green border) and 'View and edit' (Other users can view and edit this contact).

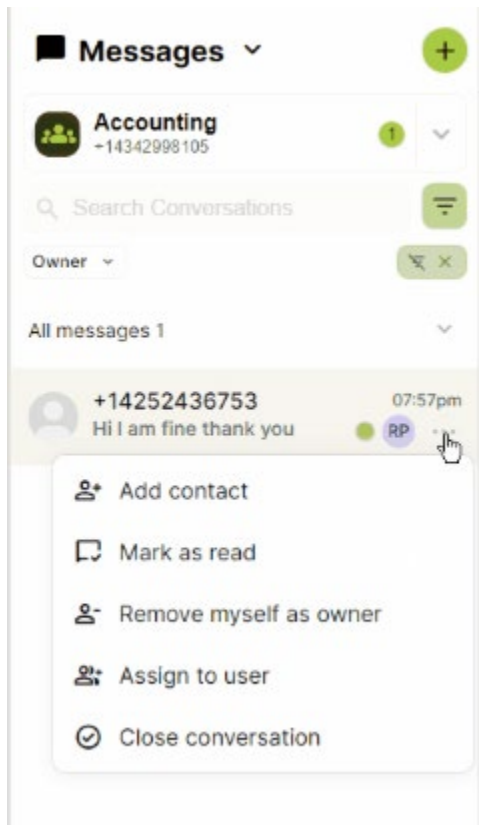
4. Once all the required information has been entered, click **Save Contact** and the contact will be filed within your SC SMS contacts.



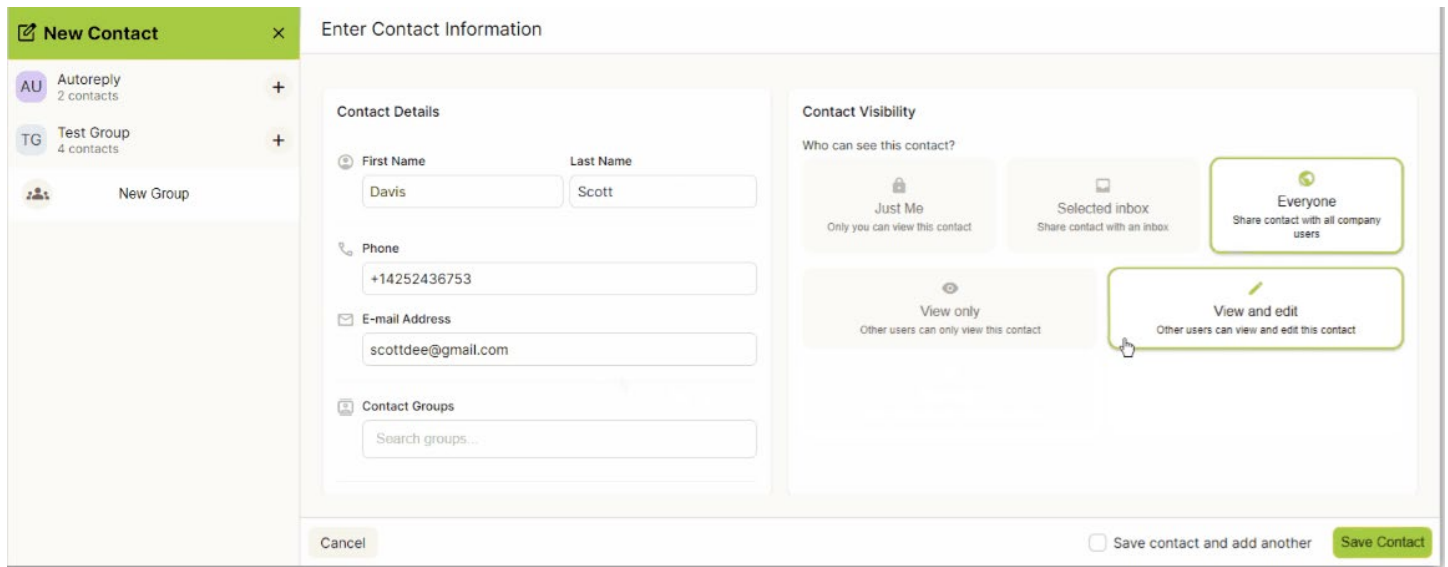
All phone numbers should follow the format in the image below. When you have entered the number, a pull-down will appear showing the correct E164 format (e.g. +1 000 000 0000), selecting this will re-format the number to be valid for saving

Option 2: Add A Contact Within an Existing Conversation

1. On an existing conversation in the **Messages** tab, click the **ellipses** button and then **Add contact**.



2. The Phone Number field will be automatically filled with the number from the conversation. The next step is to complete the rest of the contact form, making sure you have filled the First Name field.
3. When all the required information has been entered, click **Save Contact** button and the contact will be filed within your SC SMS contacts.




The screenshot shows the 'New Contact' form with the following fields and options:

- Contact Details:**
 - First Name: Davis
 - Last Name: Scott
 - Phone: +14252436753
 - E-mail Address: scottdee@gmail.com
 - Contact Groups: Search groups...
- Contact Visibility:**
 - Who can see this contact?
 - Just Me (Only you can view this contact)
 - Selected inbox (Share contact with an inbox)
 - Everyone (Share contact with all company users)
 - View only (Other users can only view this contact)
 - View and edit (Other users can view and edit this contact)

At the bottom of the form, there are buttons for 'Cancel', 'Save contact and add another', and 'Save Contact'.

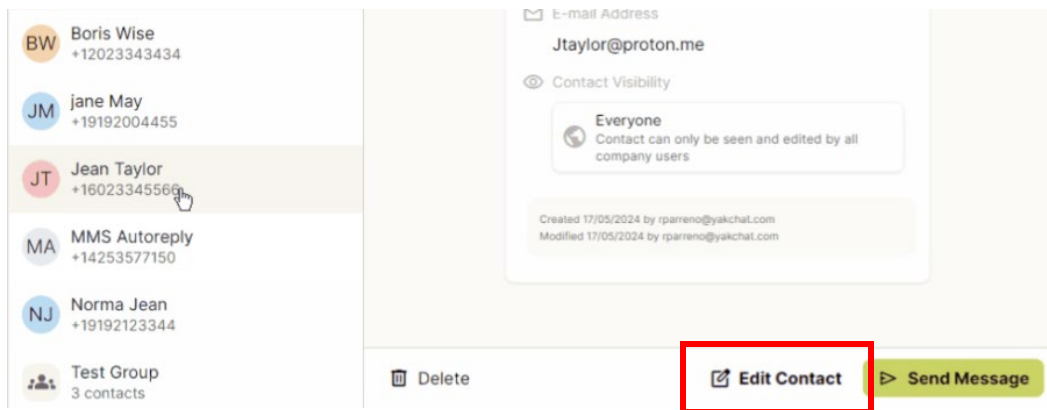
Editing a contact

Editing a contact allows you to change or amend every detail that can be entered when creating a contact.

 **Note:** You may only edit a contact if you have created or own the contact, or you have been given permission to edit that contact by the creator or administrator.

Option 1: Edit a contact via Contacts tab

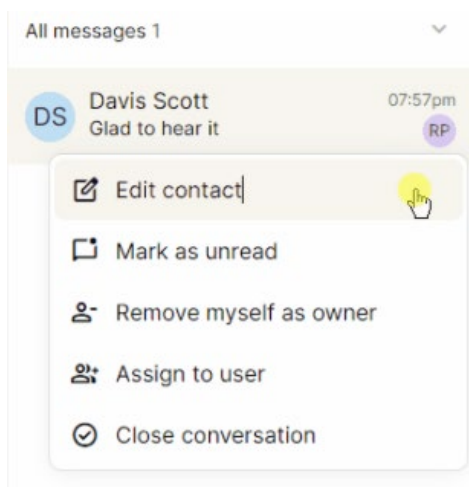
1. Go to the **Contact tab** and click on a **contact** you would like to edit. Select the **Edit Contact** button at the bottom of the screen.



2. The contact edit page will be displayed, here you can make changes to any fields that need to be changes.
3. Once the changes have been made press the **Save Contact** button and the contact will be update along with all associated conversations.

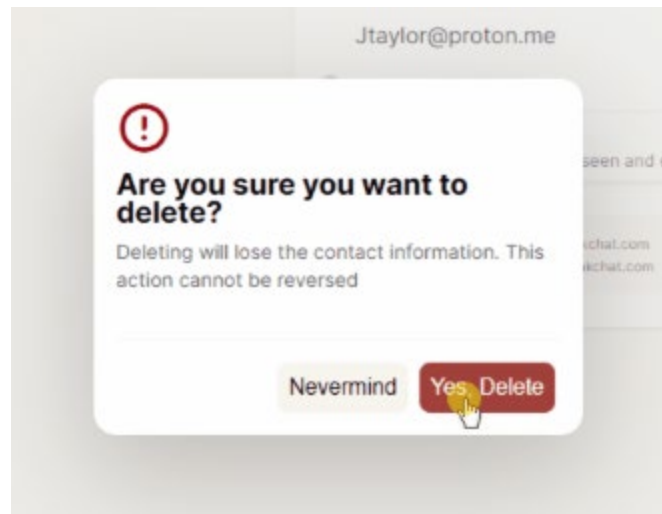
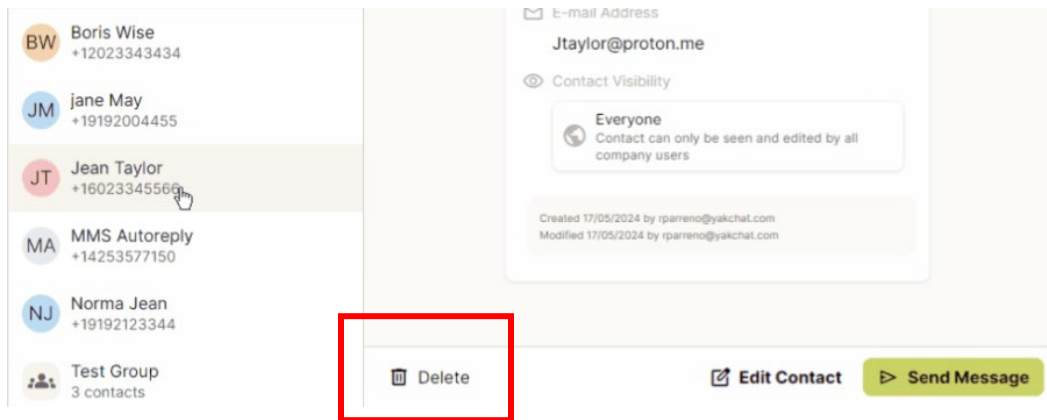
Option 2: Edit A Contact Via the Messages Tab

1. Go to the **Messages tab** and select a conversation with the contact you would like to edit.
2. Click the **ellipses** for the conversation and then select **Edit Contact**.
3. The contact edit page will be displayed, here you can make changes to any field that needs to be changed.
4. Once the changes have been made press the **Save Contact** button and the contact will be updated along with all associated conversations.



Deleting A Contact

To delete a contact, navigate to the Contact tab and select the **contact** you would like to delete. This will display all the information for this contact. Click the **Delete** button at the bottom of the screen.



Note: The contact will be deleted and conversations with the contact will display the phone number rather than the name of the contact.