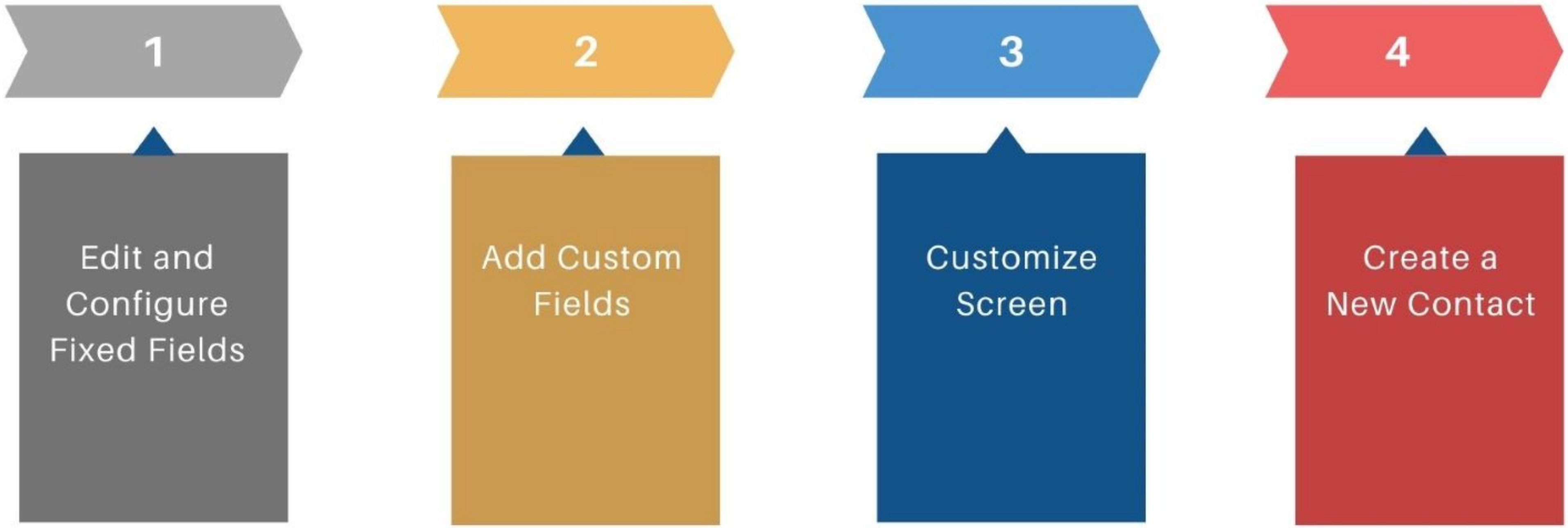
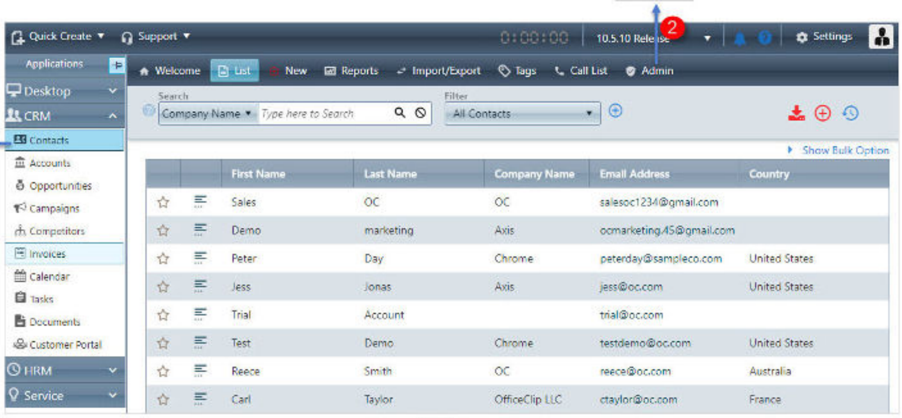
QUICK SETUP GUIDE FOR CONTACT MANAGER



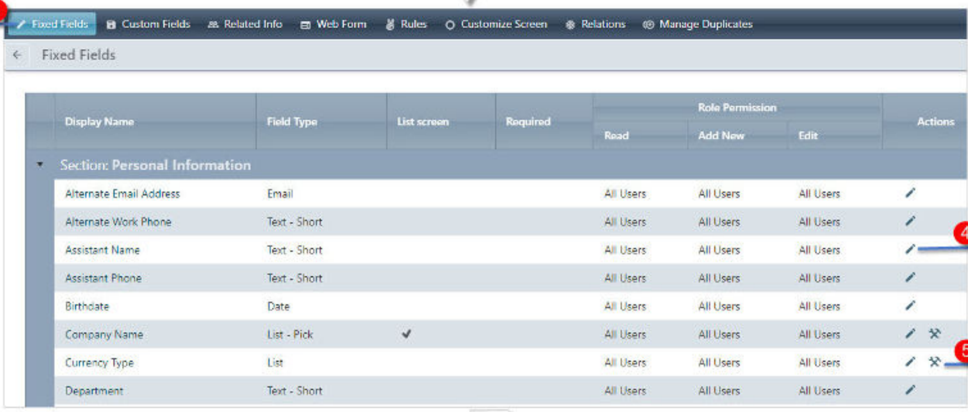
Step 1: Edit & Configure Fixed Fields

Select Admin

Click on Contacts



Select Fixed Fields

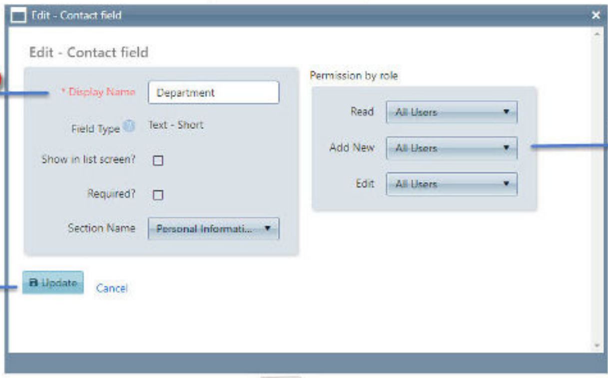


To edit fields, click on Edit icon

To configure a field, click on the Configure icon

Edit Field

Add the desired field

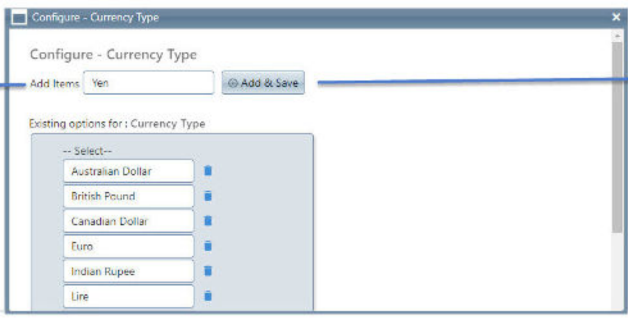


Set Permissions

Click on Update to save changes

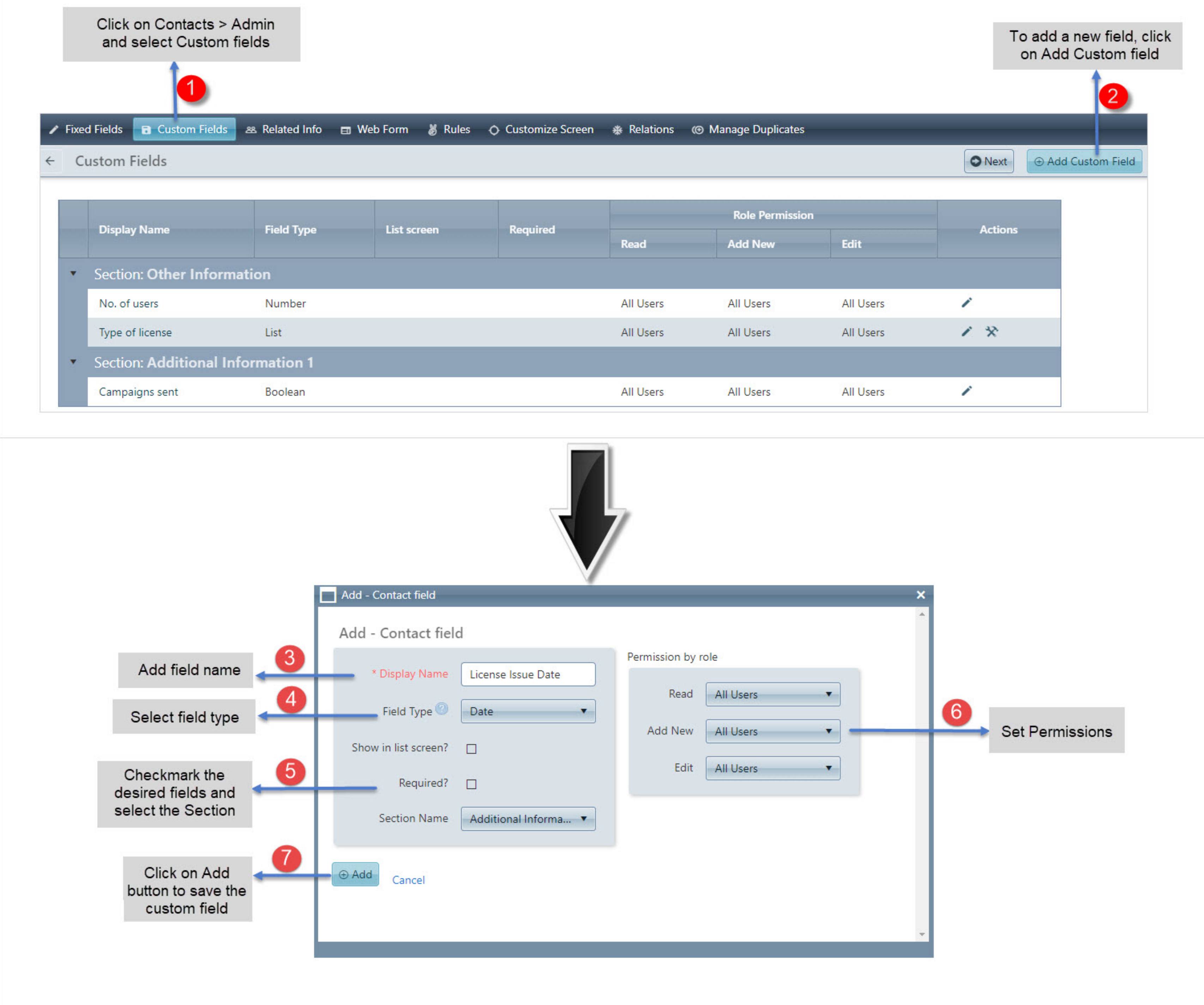
Configure List Fields

Add list items



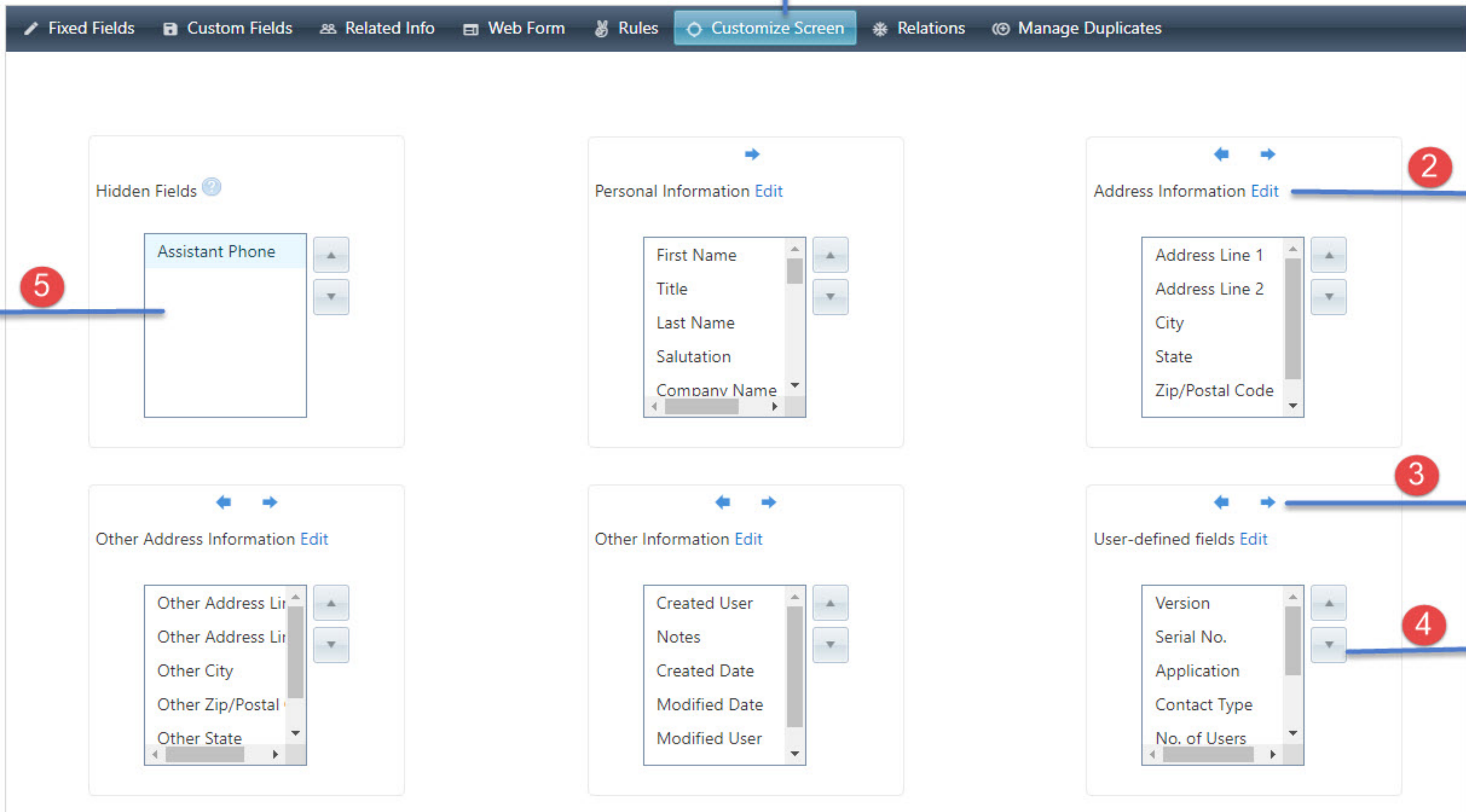
Click Add & Save to save list item

Step 2: Add Custom Field



Step 3: Customize Screen

1. To set up fields as per your preference, click Contacts > Admin and then select Customize Screen



2. To change the title, click on Edit

3. Interchange the sections by clicking on the desired arrow buttons

4. Arrange the fields in desired order with the up and down arrow keys

5. Drag and drop fields to Hidden fields section, if you do not wish them to display

Step 4: Creating a new Contact