User Manual: **Contact Management MashApp**

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1. Introduction

This user manual is designed to guide you through using the **Contact Management** MashApp solution to record personal contact information of employees and other relations such as customers, suppliers etc. of your organization. This MashApp was built using **Composer**, a MashApp tool from **Cordys Process Factory** (**CPF**).

Usually, when you have a manual contact management system, the bottlenecks are many. For example, the long tedious procedures are time-consuming and taxing, which makes it difficult to manage. Moreover, it is difficult to maintain and locate the contacts.

To avoid such bottlenecks, we are providing the **Contact Management** MashApp, which will help you:

- Maintain paperless records
- Track contact information easily
- Make communication to contacts easier and effective

To use the **Contact** MashApp, you need to first set up organization data such as application users, roles, and groups and then set up MashApp **Master Data** such as countries, departments, groups, business partner types, business partners, employees, existing applications, profile templates, newsletters, etc.

After setting up the required data, you can use the MashApp to manage contacts. You can create new contact profiles, approve them according to various levels of privacy, and also subscribe for MashApp accounts. You can manage contact registrations. You can also monitor data through forms, charts, and reports.

2. Setting up Organization Data

Now, you need to set up organization data such as roles, groups, application users, and application privileges.

> ***Note**: You can set up organization data only if you have either **Admin** or **Contact Management Administrator** privilege.*

2.1 Creating Application Users

Now, you need to create application users to enable users in your organization to access the **Contact Management** MashApp. You also need to assign users the appropriate privilege to restrict their access within the MashApp. Do the following to set up application users.

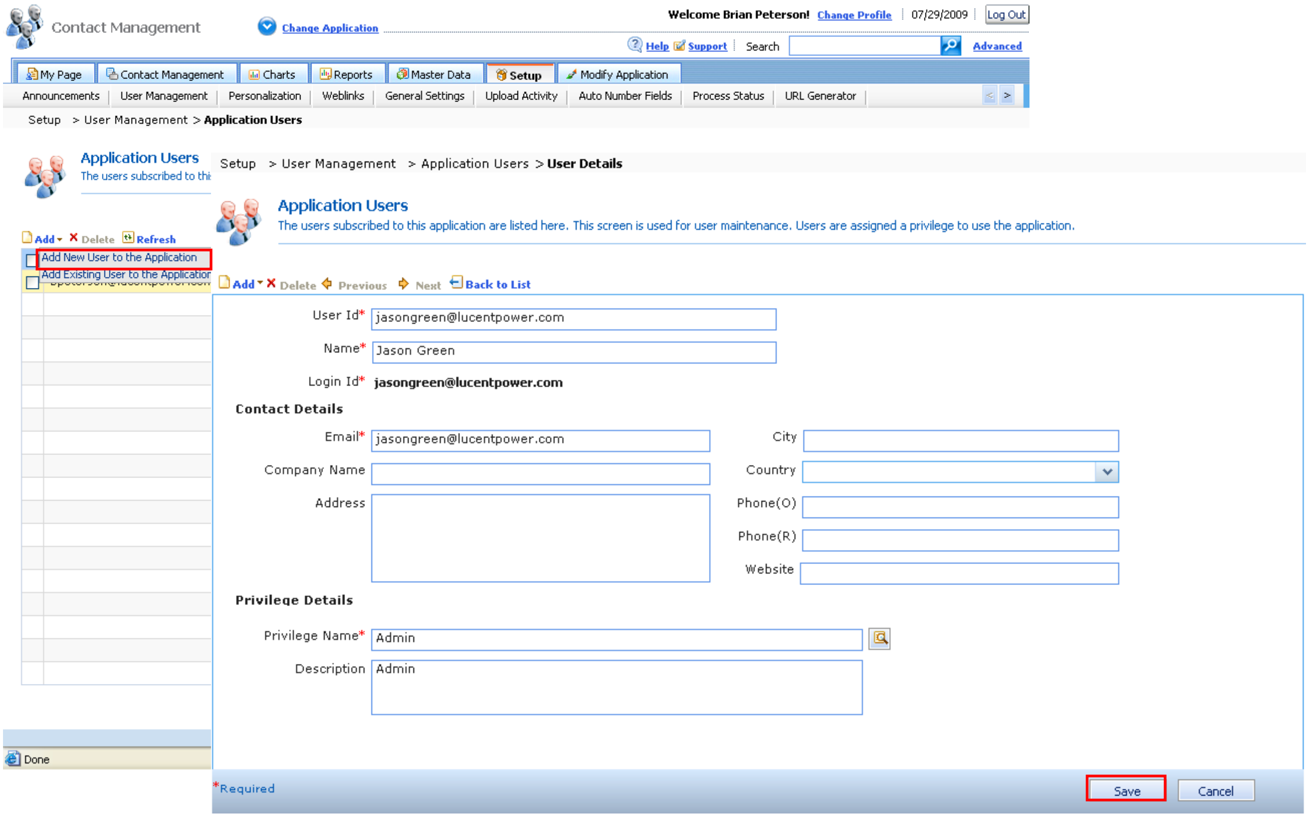
1. Click **Setup** → **User Management**. The **User Management** page appears.
2. Click **Go to** for **Application Users**. The **Application Users** page appears, displaying a list of existing application users, if any.
3. Create an application user. Do the following.
   a. Click **Add** and select **Add New User to the Application**.
   b. In the **User Id** field, type the unique id of the user in the form of a valid email address. For example, "lmiller@radiantpower.com". This email address is populated in the **Login Id** and **Email** fields respectively.

      The credentials required to access the **Contact Management** MashApp will be sent to the user via email.

      > ***Note**: You cannot modify the **Login Id**.*

   c. Provide the required details of the application user such as **Name** and **Contact Details**.
   d. Assign a privilege to the user to access the **Contact Management** MashApp. Click for **Privilege Name**. The **Application Privileges** dialog box appears.
   e. Select one of the following privileges to assign to the user according to their role in the organization:
      - **Admin**: This privilege enables users to create application users as well as maintain the **Master Data** that needs to be set up for the functioning of the MashApp. For example, Departments, Employees, Business Partners, etc.
      - **Contact Management Administrator**: This privilege enables users to perform all the functions of an **Admin.** In addition to this, the user can also customize the application through the **Modify Application** tab.
      - **Manager**: This privilege enables users to create contact profiles and view contact details of those under him or her. The user can also view charts and reports to monitor the data.
      - **Contact Management User**: This privilege enables the users to create contact profiles for themselves and others.
      - **Registered User**: This privilege enables the external users to create contact profiles.

      Click **OK**. The privilege is assigned. The description of the privilege appears in the **Description** field.



f. Click **Save**.

An application user is created and the required privilege is assigned to the user. As soon as the user is added, he or she receives an email with the **Login Id** and **Password** required to log in to the **Contact Management** MashApp.

This application user is also an organization user. So, you can grant access to this user to other applications in the organization through the **Setup** tab for those applications using the **Add Existing User to the Application** option.

You have created an application user successfully.

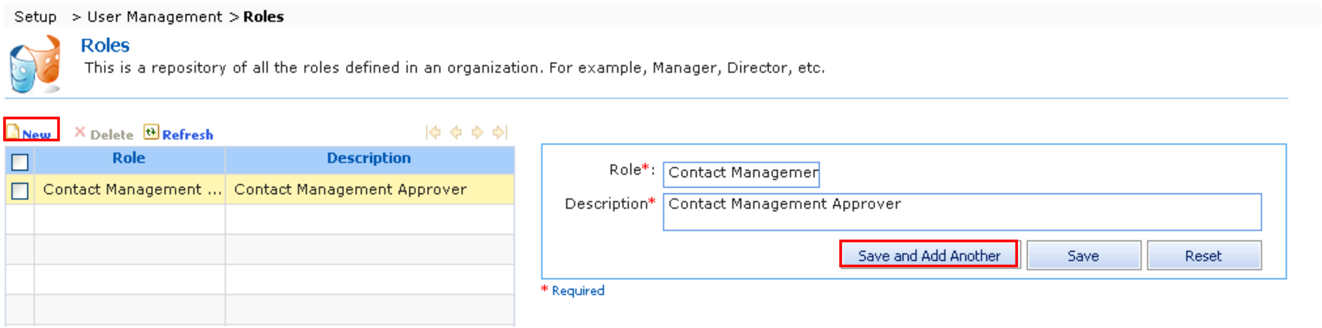
2.2 Creating Roles

Roles define the responsibilities assigned to a user. You need to create three roles:

- **Contact Management Approver**
- **Account Creator**
- **Account Verifier**

First, you need to create the **Contact Management Approver** role. Do the following.

1. Click **Setup → User Management**. The **User Management** page appears.
2. Click **Go to** for **Roles**. The **Roles** page appears.
3. Create the **Contact Management Approver** role. Do the following.
   a. Click **New**. In the **Role** field, type "Contact Management Approver".
   b. In the **Description** field, type "Contact Management Approver".



c. Click **Save and Add Another**. The **Contact Management Approver** role is created and the values are cleared for another role.

4. Similarly, create the following roles:
   - **Account Creator**
   - **Account Verifier**

You have created the roles successfully.

2.3 Creating Groups

Groups enable you to group users in your organization as well as assign responsibilities to users in the form of roles. You need to create a group called **Administration** and assign appropriate responsibilities to users in this group.

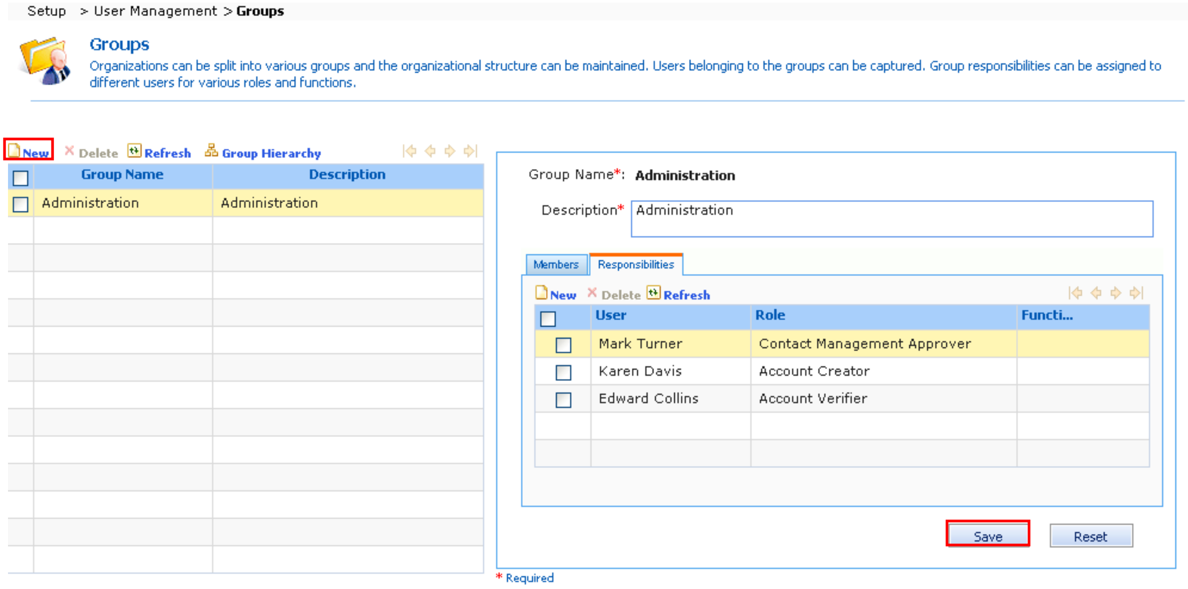
First, you need to create the **Administration** group and then assign the **Contact Management Approver** role to a user in the group. Do the following.

1. Click **Setup → User Management**. The **User Management** page appears.
2. Click **Go to** for **Groups**. The **Groups** page appears.
3. Create the **Administration** group. Do the following.
   a. Click **New**. In the **Group Name** field, type "Administration".
   b. In the **Description** field, type "Administration".
   c. Click the **Responsibilities** tab to assign responsibilities to users.
   d. Click **New** to assign the responsibility of a **Contact Management Approver** to a user. The **New Responsibility** dialog box appears.

      Do the following.

      i) Click for **User**, select the user to whom you want to assign the **Contact Management Approver** role, and click **OK**.

      ii) Click for **Role**, select the **Contact Management Approver** role, and click **OK**.
   e. **Click OK**. The responsibility of a **Contact Management Approver** is assigned to the user.
   f. Similarly, assign responsibilities of an **Account Creator** and **Account Verifier** to users in the **Administration** group**.**



g. Click **Save**.

You have created a group and assigned responsibilities to users in the group successfully.

3. Setting up Master Data

After setting up the required application users, you need to set up the **Master Data** that is required for the functioning of the **Contact Management** MashApp.

> ***Note**: You can set up **Master Data** only if you are assigned the **Admin** or **Contact Management Administrator** privilege.*

3.1 Countries

You can add countries by doing any one of the following, namely, adding countries manually, loading countries using a Web service, or uploading countries from a Google spreadsheet.

Adding Countries Manually

You can add countries manually if there are only a few countries to add. Do the following.

1. Click the **Master Data** tab.
2. Click **View** for **Countries**. The **Countries** form appears.
3. Click **New** to add a country.
4. Provide the **Country Code** and **Country Name**.
5. Click **Save & Close**.

You have manually added countries successfully.

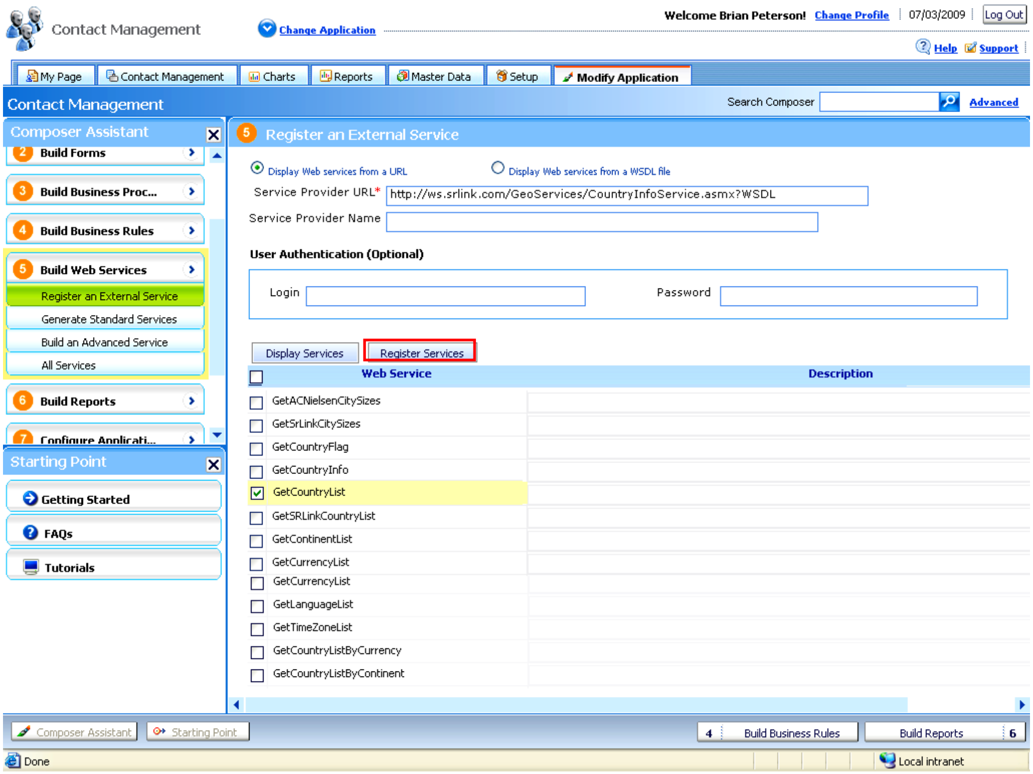
Loading Countries Using a Web Service

You can load countries using a third party Web service. Do the following.

1. Click the **Modify Application** tab and click **Build Web Services → Register an External Service**.
2. Select the **Display Web services from a URL** option.
3. In the **Service Provider URL** field, provide a service provider URL for retrieving the countries. For example, "http://ws.srlink.com/GeoServices/CountryInfoService.asmx?WSDL".

> ***Note**: The availability of the Web Service depends on the third party Web service provider. If you encounter any issues with the sample URL, try after sometime.*

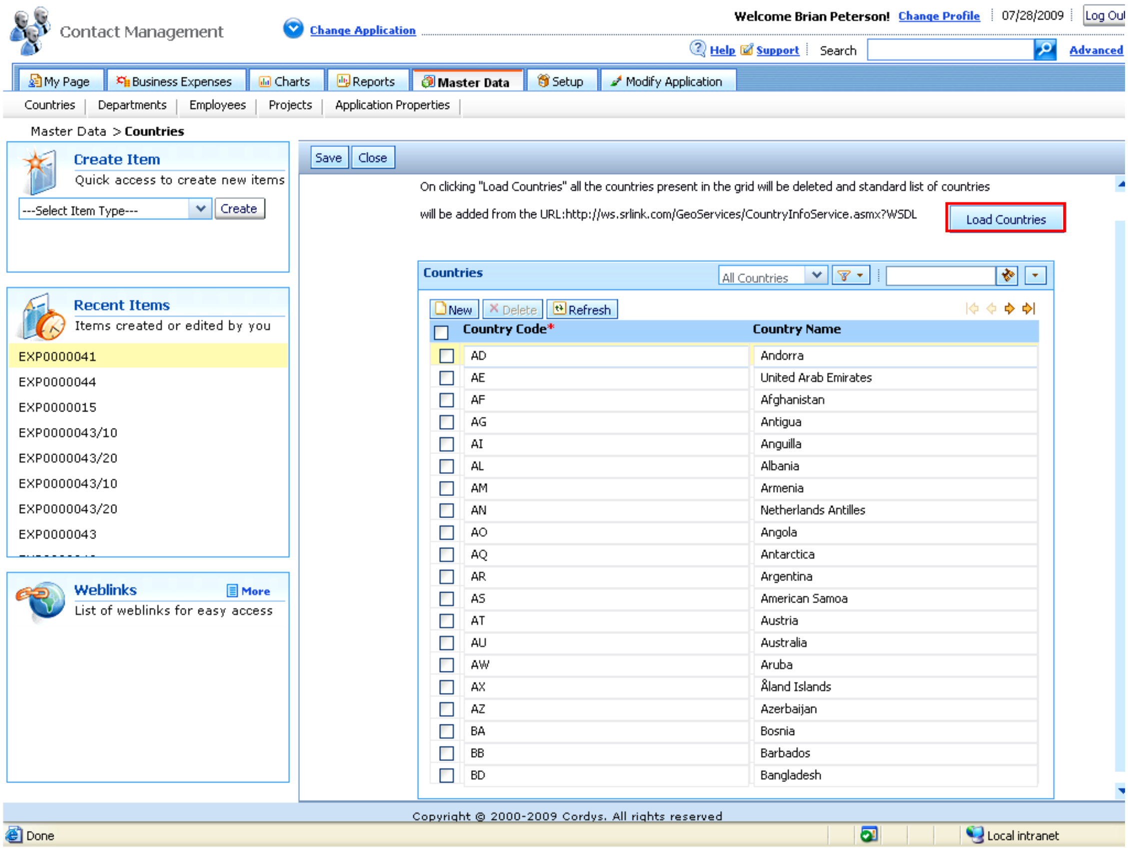
4. Provide a **Service Provider Name**, if required. This is optional.
5. Leave **User Authentication** blank as it is not required for this Web service.
6. Then, click **Display Services**. The Web services are displayed.
7. Select the check box for the **GetCountryList** Web service and click **Register Services**.



You have registered the **GetCountryList** external Web service successfully.

Now, do the following to load the countries in the **Countries** form.

1. Click the **Master Data** tab.
2. Click **View** for **Countries**. The **Countries** form appears.
3. Click **Load Countries** to load all the standard countries from the displayed URL. The countries are listed in the **Countries** grid.



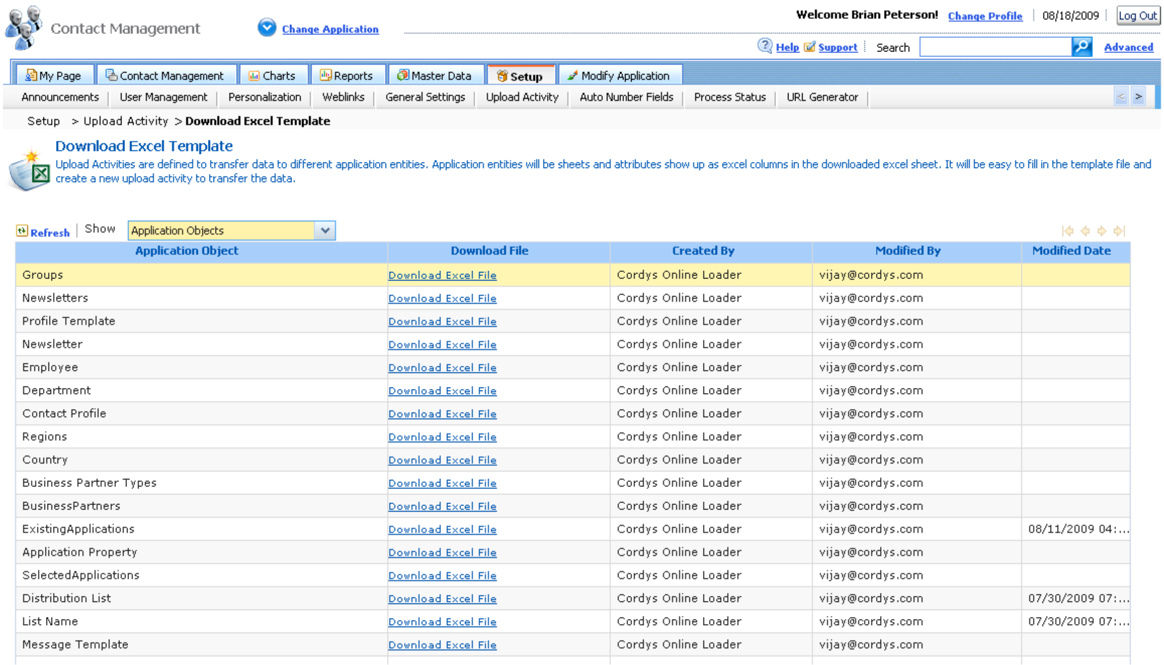
4. Click **New** to add a country that is not in the standard list, if required. You need to provide the **Country Code** and **Country Name** to add a country.
5. Click **Save & Close**.

You have loaded countries successfully.

Uploading Countries from a Google Spreadsheet

You can upload countries using a Google account. Do the following.

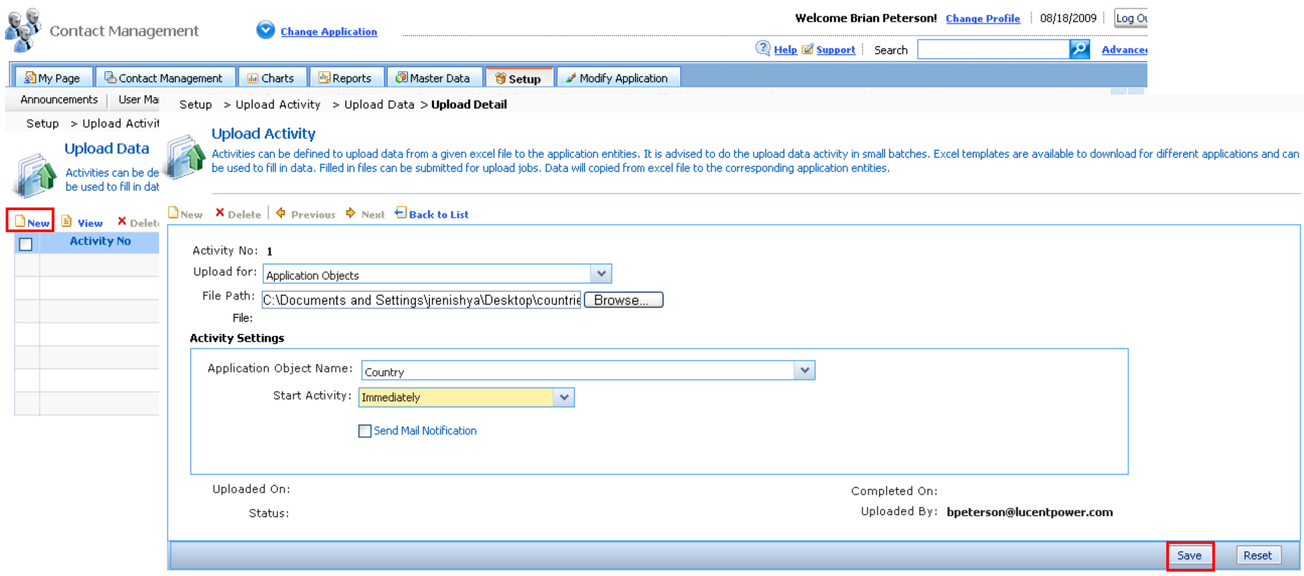
1. Click the **Setup** tab.
2. Click **Upload Activity → Download Excel Template**. The **Download Excel Template** page appears. Do the following.
    a. In the **Show** drop-down list, select **Application Objects**.



b. Click **Download Excel File** for **Country**. Click **Save** and save it to the desktop.

3. Copy the standard list of countries from the Google spreadsheet URL "http://spreadsheets.google.com/ccc?key=0AgU2e_O0PgCtdGZIQkR5UGlRbXRJMDNiV1k3MFV4dVE&hl=en" to the downloaded template and click **Save**.
4. Click **Upload Activity → Upload Data**. The **Upload Data** page appears.
5. Click **New** to upload data. The **Upload Activity** page appears.
6. In the **Upload for** drop-down list, select **Application Objects**.
7. Click **Browse** for **File Path**, select the template with countries data, and click **OK**.
8. In the **Activity Settings** section, do the following.

a. In the **Application Object Name** drop-down list, select **Country**.



b. In the **Start Activity** drop-down list, select **Immediately**.

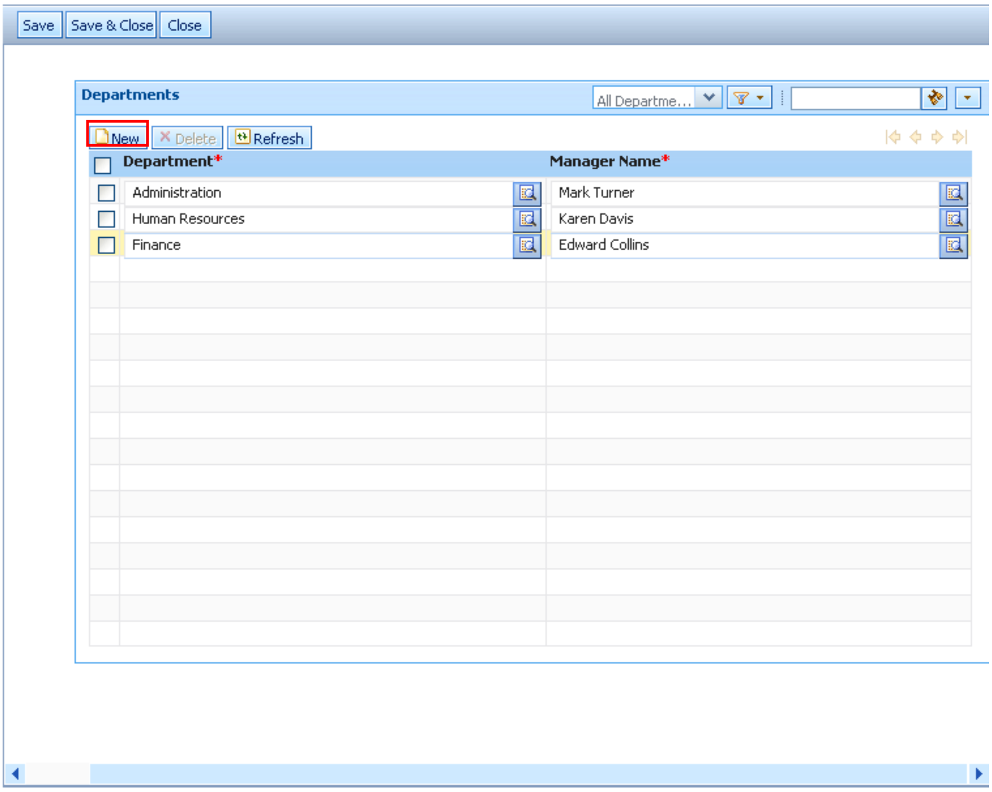
9. Click **Save**.

You have uploaded countries successfully.

3.2 Departments

You need to add the departments in your organization and identify a responsible person for each department. Do the following.

1. Click the **Master Data** tab.
2. Click **View** for **Departments**. The **Departments** form appears.
3. Click **New** to add a new department.
4. Provide the details of the department. Do the following.
    a. In the **Department** field, provide a name for the department. For example, Finance. You can also click for **Department**, select an existing group that you want to add as a department, and click **OK**.
    b. Click for **Manager Name**, select the organization user you want to add as the manager for the department, and click **OK**.



5. Click **Save & Close**.

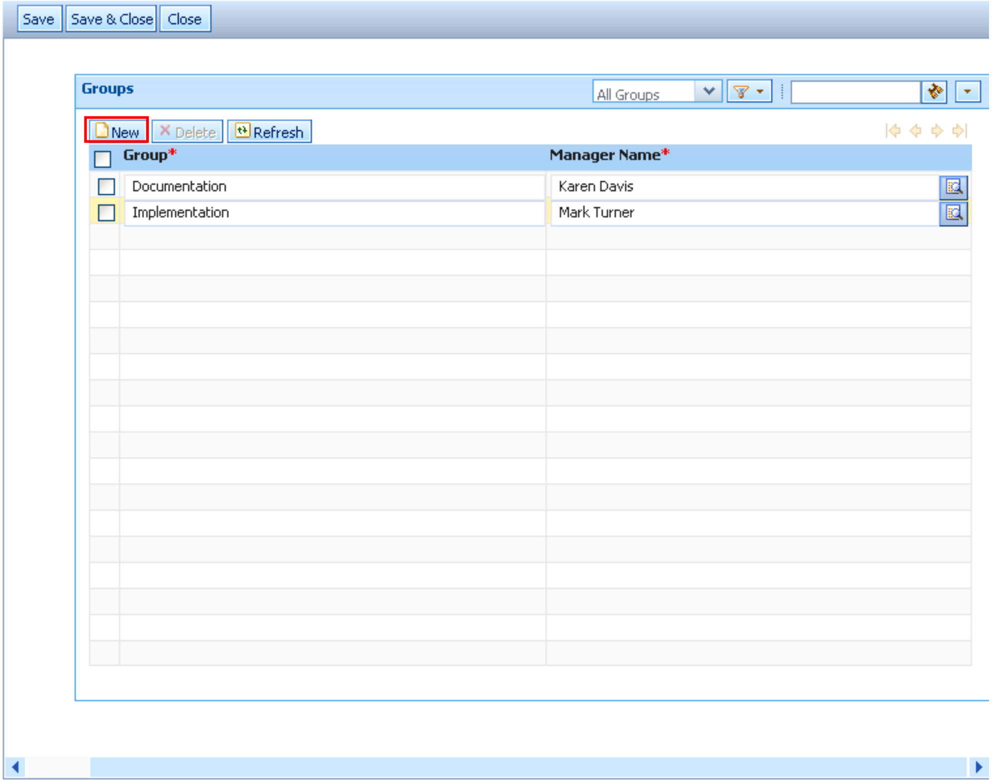
You have added a department successfully.

3.3 Groups

You need to add the groups in your organization and identify a responsible person for each group. Do the following.

1. Click the **Master Data** tab.

2. Click **View** for **Groups**. The **Groups** form appears.
3. Click **New** to add a new group.
4. Provide the details of the group. Do the following.
   a. In the **Group** field, provide a name for the group. For example, Documentation.
   b. Click for **Manager Name**, select the organization user you want to add as the manager for the group, and click **OK**.



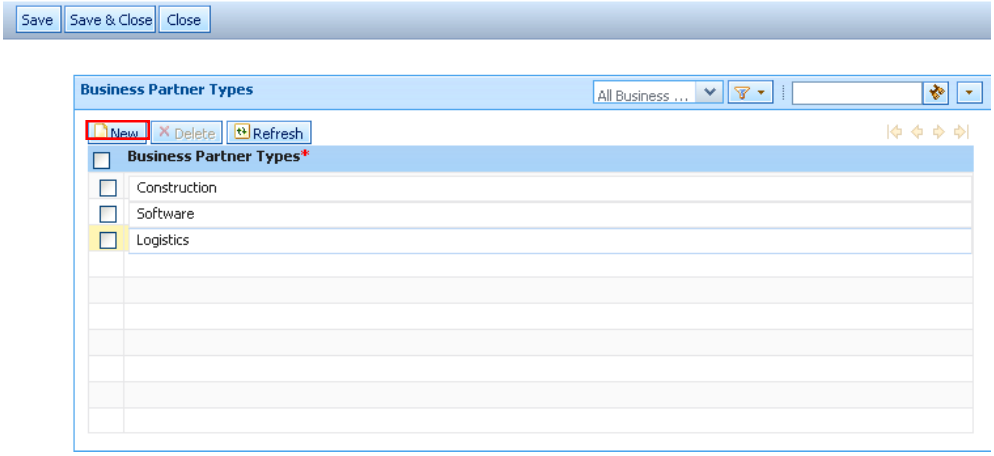
5. Click **Save & Close**.

You have added a group successfully.

3.4 Business Partner Types

You need to add the types of industries in which your business partners operate. Do the following.

1. Click the **Master Data** tab.
2. Click **View** for **Business Partner Types**. The **Business Partner Types** form appears.
3. Click **New** to add a new business partner type.
4. In the **Business Partner Type** field, provide the type of industry the business partner operates in. For example, Construction.
5. Click **Save & Close** to save the changes and close the **Business Partner Types** form.

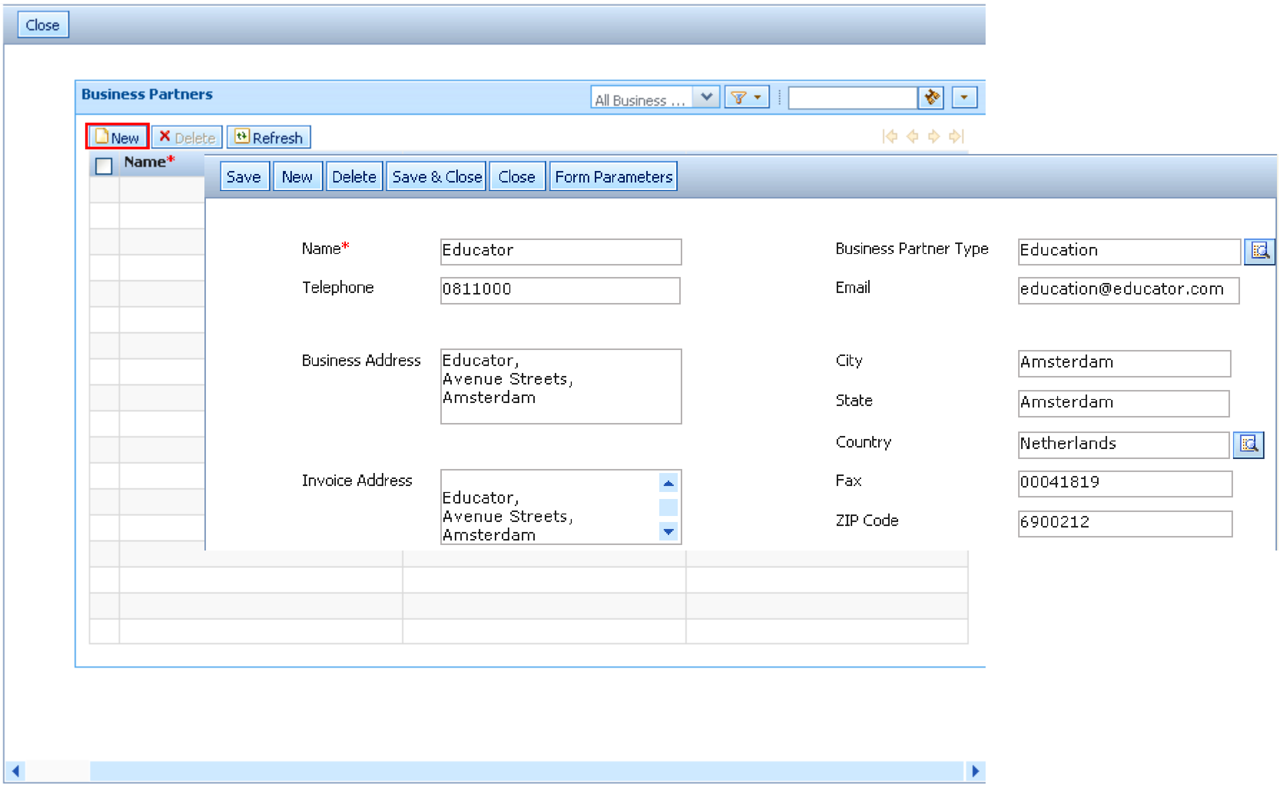


You have added a business partner type successfully.

3.5 Business Partners

You need to add the names of your business partners. Do the following.

1. Click the **Master Data** tab.
2. Click **View** for **Business Partners**. The **Business Partners** form appears.
3. Click **New** to add a new business partner. The **Business Partner** form appears.
   a. In the **Name** field, provide a name.
   b. Click for **Business Partner Type** and select a business partner type.
   c. Provide other details such as **Email**, **City**, **State**, etc.
   d. To select a **Country**, click and select a country from the list that appears.



4. Click **Save & Close** to save the changes and close the **Business Partner** form. The new business partner appears in the list of business partners in the **Business Partners** form.
5. Click **Close**.

You have added a business partner successfully.

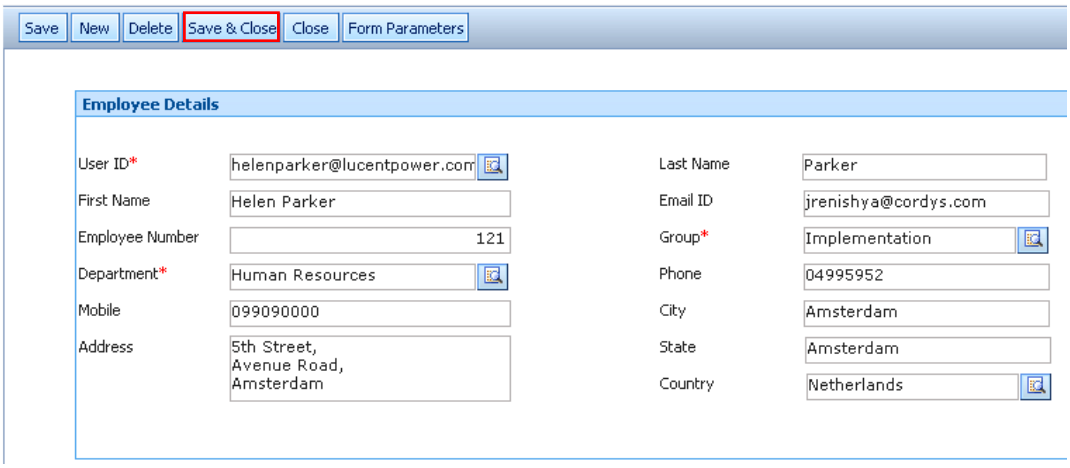
3.6 Employees

You need to add the employees needed for **Contact Management**.

> ***Note:***
>
> - *Any user who needs to create a contact profile must be added as an employee in the **Employees** form.*
> - *Also, every employee must be an application user. You need to ensure that you already added the new employee as an application user in **Section 2.1**.*

Do the following to add employees.

1. Click the **Master Data** tab.
2. Click **View** for **Employees**. The **Employees** form appears.
3. Then, click **New** to add a new employee. The **Employee** form appears.
4. Click for **User ID**, select the organization user you want to add as an employee, and click **OK**. The user's details appear in the **User ID**, **First Name,** and **Email** fields.
5. Provide the **Last Name and Department**. You can click for the **Department** field to select a department from the departments you set up earlier.
6. Provide other employee details as needed.



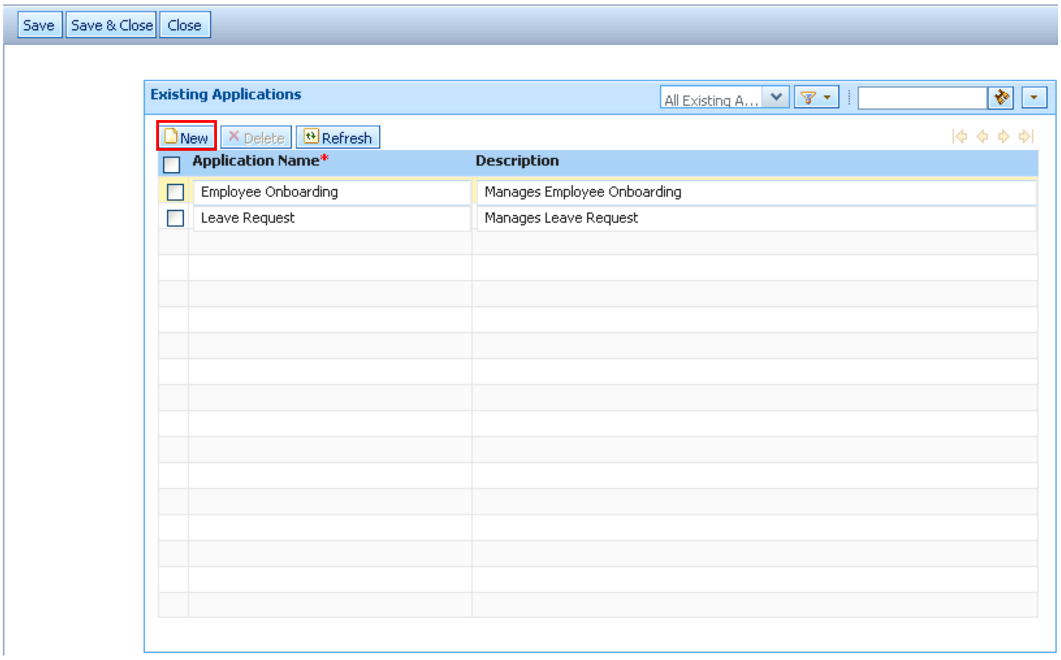
7. Click **Save & Close** to save the changes and close the **Employee** form. The new employee appears in the list of employees in the **Employees** form.
8. Click **Close**.

You have added an employee successfully.

3.7 Existing Applications

You need to add an application to which a user can subscribe. Do the following.

1. Click the **Master Data** tab.
2. Click **View** for **Existing Applications**. The **Existing Applications** form appears.
3. Click **New** to add a new application.
4. Provide an **Application Name** and **Description**.



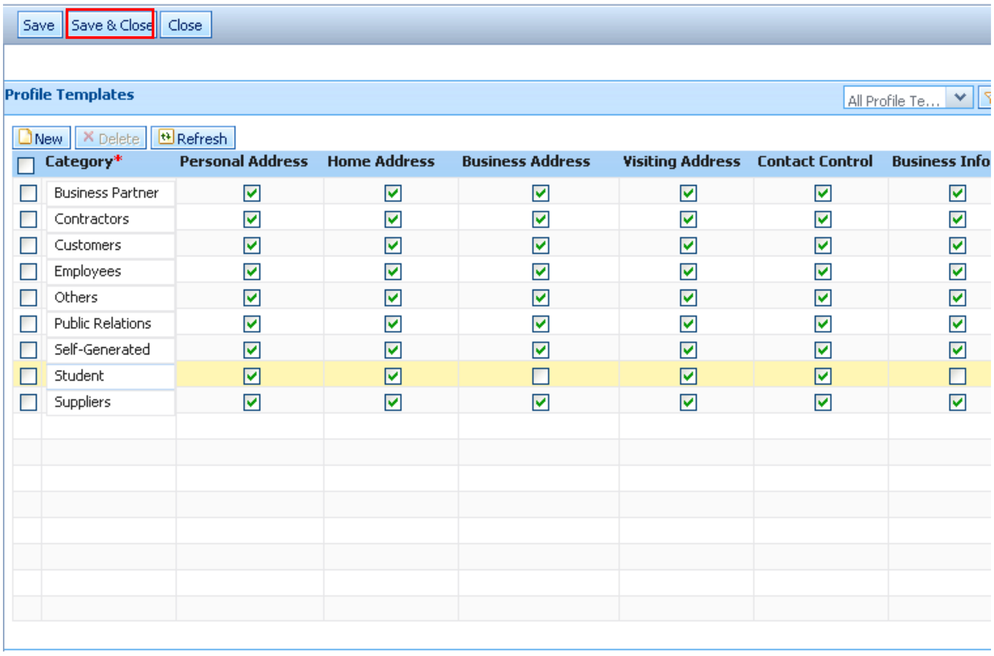
5. Click **Save & Close.**

You have added an application successfully.

3.8 Profile Templates

You can select a standard template for the contact profile depending on the contact category. Do the following.

1. Click the **Master Data** tab.
2. Click **View** for **Profile Templates**. The **Profile Templates** form appears.
3. Click **New** to add a profile template. You need to provide the **Category.**
4. Clear the check boxes for the fields that you do not want to include in the template for each category. For example, if you added the Student category and you only want **Personal Address**, **Home Address**, **Contact Control** and **Application Subscription**, then leave these check boxes selected and clear the check boxes for the remaining fields for the Student category.



5. Click **Save & Close**.

You have added a profile template successfully.

3.9 Newsletters

You can add a newsletter for users to subscribe to it. Do the following.

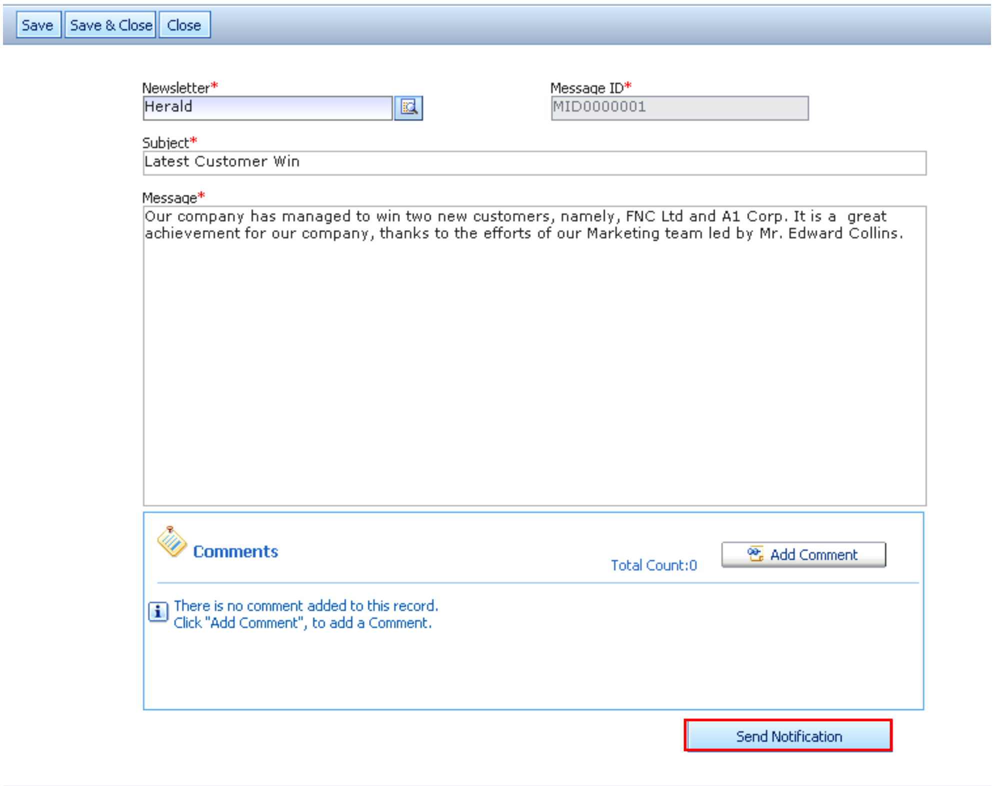
1. Click the **Master Data** tab.
2. Click **View** for **Newsletters**. The **Newsletters** form appears.
3. Click **New** to add a newsletter. In the **Newsletter** field, provide a name for the newsletter.
4. Click **Save & Close**.

You have added a newsletter successfully.

3.10 Newsletter Announcement

You can add a newsletter announcement. Do the following.

1. Click the **Master Data** tab.
2. Click **New** for **Newsletter Announcement**.
3. Click for **Newsletter**, select a newsletter, and click **OK**.
4. In the **Subject** field, provide a subject for the announcement.
5. In the **Message** field, provide the text for the announcement.



6. If you need to add any comments, do the following.
   a. Click **Add Comment**. The **Comment** form appears.
   b. Provide a **Comment Title** and provide text for the comment. You can also click **Add Attachment** to add attachments to the comment, if required.
   c. Click **Save**.
7. Now, click **Save**. The **Send Notification** button becomes active.
8. Click **Send Notification** to send the notification to the subscribers.

You have sent a newsletter announcement successfully.

3.11 Application Announcement

You can add an application announcement. Do the following.

1. Click the **Master Data** tab.
2. Click **New** for **Application Announcement**.
3. Click for **Application Name**, select an application, and click **OK**.
4. In the **Subject** field, provide a subject for the announcement.
5. In the **Message** field, provide the text for the announcement.
6. If you need to add any comments, do the following.
   a. Click **Add Comment**. The **Comment** form appears.
   b. Provide a **Comment Title** and provide text for the comment. You can also click **Add Attachment** to add attachments to the comment, if required.
   c. Click **Save**.
7. Now, click **Save**. The **Send Notification** button becomes active.

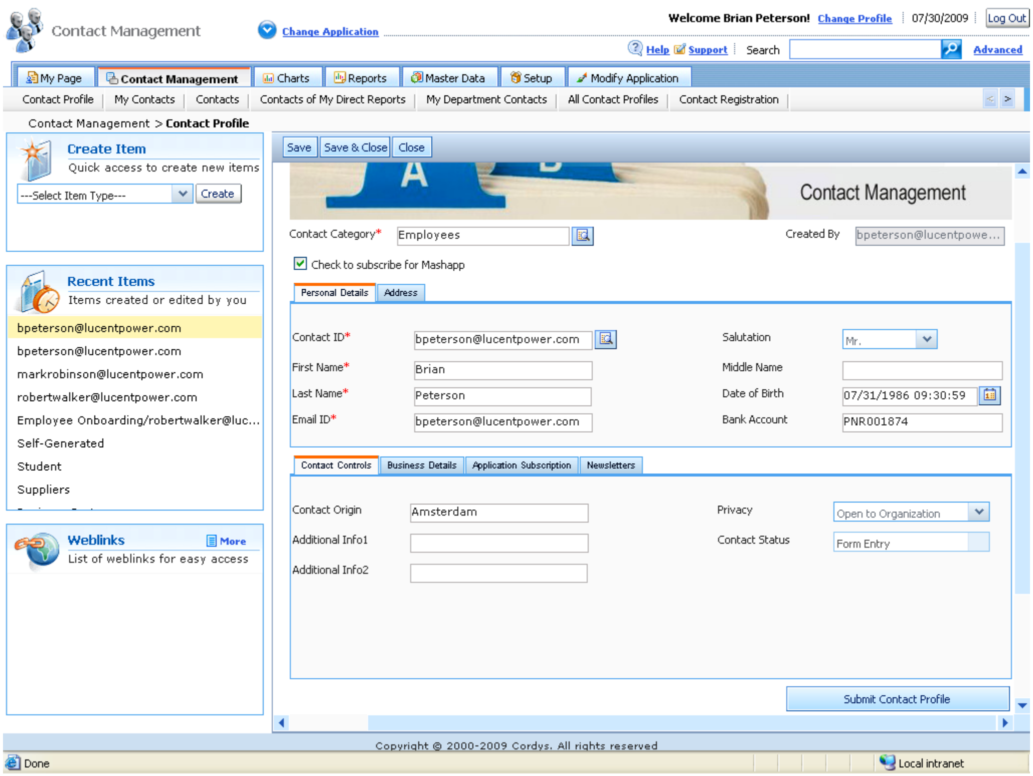
8. Click **Send Notification** to send the notification to the subscribers.

You have sent an application announcement successfully.

4. Creating a Contact Profile

You can create a contact profile to manage information on organization relations. Do the following.

1. Click the **Contact Management** tab.
2. Click **New** for **Contact Profile**. The **Contact Profile** form appears.
3. Click for **Contact Category**, select a contact category, and click **OK**.
4. If you want to subscribe the contact for any existing application, select the check box for **Check to subscribe for MashApp**.
5. Now, on the **Personal Details** tab, do the following.
   a. In the **Contact ID** field, provide a new contact ID. You can also click for **Contact ID**, select an organization user, and click **OK**. The email address of the contact appears in the **Email ID** field.
   b. Provide other details such as **Salutation**, **First Name**, **Last name**, **Bank Account**, etc.
6. On the **Address** tab, do the following.
   a. On the **Home Address** tab, provide the details related to your home address.
   b. Similarly, on the **Business Address** and **Visiting Address** tabs, provide the details related to your business and visiting addresses respectively.



7. In the **Other Details** section, on the **Contact Controls** tab, do the following.
   a. In the **Contact Origin** field, provide the place to which the contact belongs.

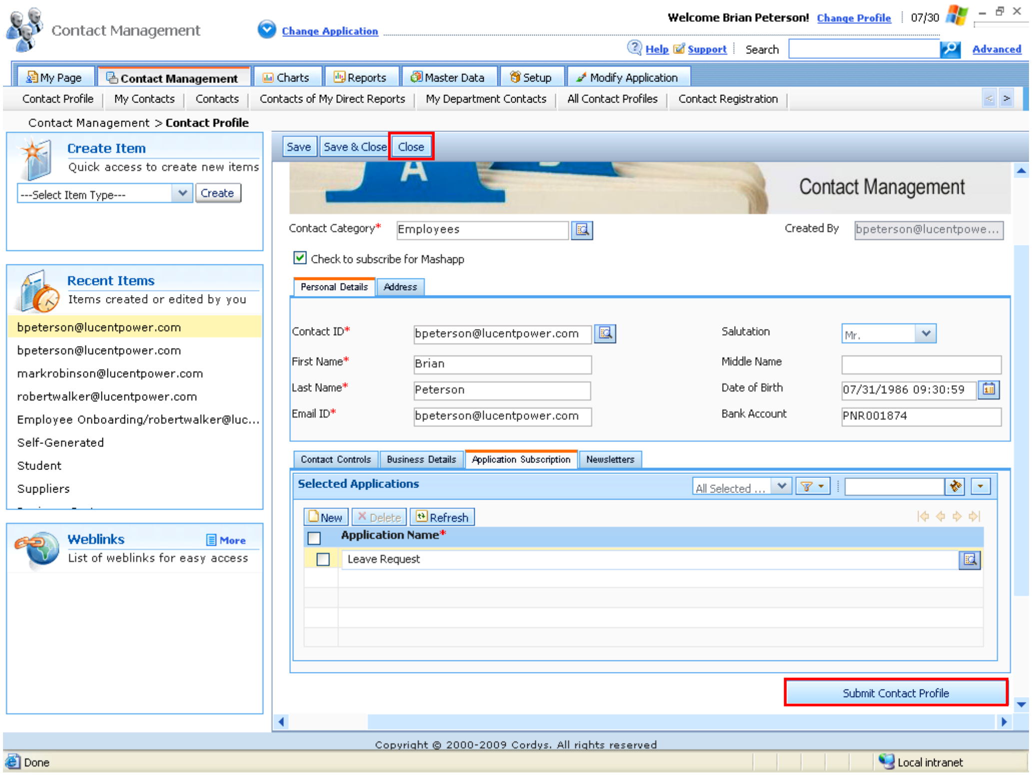
b. In the **Privacy** drop-down list, select one of the following.
   - **Private**: Only you can see the contact details. Also, there is no approval required to create the contact profile.
   - **Open to Group**: All the members of the concerned group can view the contact details. Approval is required from the person authorized to approve contact profiles for the particular group.
   - **Open to Department**: All the employees in the concerned department can view the contact details. Approval is required from the persons authorized to approve contact profiles for the concerned group and department respectively.
   - **Open to Organization**: All the employees in the organization can view the contact details. Approval is required from the persons authorized to approve contact profiles for the concerned group and department. Also, approval is required from the **Admin**.

c. In the **Additional Info 1** and **Additional Info 2** fields, provide additional information, if any.

8. On the **Business Details** tab, do the following.
   a. Provide the **Company Name** of the contact.
   b. Click for **Business Partner** to select a business partner, if required.
   c. Click for **Country** to select a country.
   d. Similarly, provide other required information such as contact numbers, **Department**, **Job Title** etc.
9. Click **Save**.
10. Click the **Application Subscription** tab to subscribe the contact for applications. Do the following.

> ***Note***: *The* ***Application Subscription*** *tab appears only if you selected the check box for* ***Check to subscribe for MashApp****.*

   a. Click **New** to add an application.
   b. Click for **Application Name**, select the application for which you want to subscribe the contact, and click **OK**.
11. Click the **Newsletter** tab to subscribe the contact for newsletters. Do the following.
   a. Click **New** to add a newsletter.
   b. Click for **Newsletter**, select the newsletter for which you want to subscribe the contact, and click **OK**.



12. Click **Submit Contact Profile**.
13. Click **Close**.

You have submitted a contact profile successfully.

5. Approving a Contact Profile

Once the contact profile is submitted, the approval process starts. The approval process differs depending on the level of privacy you have selected while submitting the contact profile. There are four different privacy levels, namely **Open to Organization**, **Open to Department**, **Open to Group**, and **Private**. Once the approval process ends, a contact is created.

5.1 Privacy Level – Open to Organization

> ***Note****: If you do not select any privacy level, then* ***Open to Organization*** *is the default selected privacy level.*

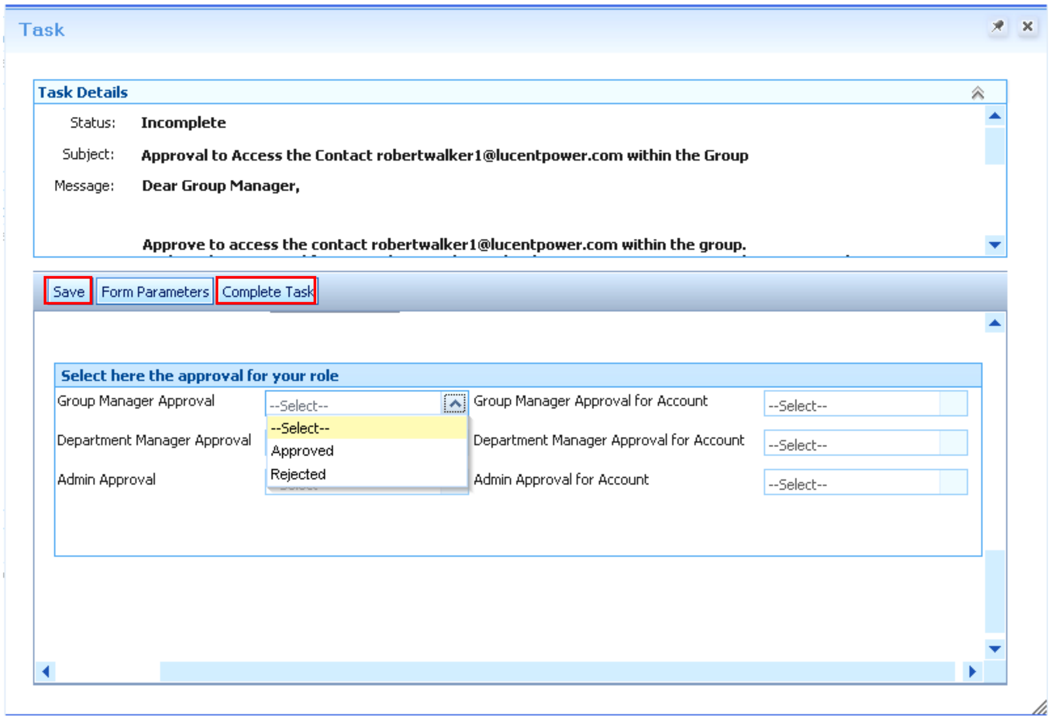
This privacy level enables the contact details to be seen by all the employees in the organization. So, the contact profile needs to be approved by the managers of the group and department to which the employee who created the contact profile belongs. The contact profile also needs to be approved by the **Admin**.

Approval by Group Manager

The **Manager**, who is responsible for the group to which the employee who created the contact profile belongs, receives a task to approve the contact profile, which is available through **My Page → My Tasks**. He or she also receives an email with the task details.

Do the following to review the contact profile and approve the task.

1. Double-click the task. The task opens, displaying the details of the contact profile.
2. Review the details and in the **Select here the approval for your role** section, select an option from the drop-down list corresponding to your role. In this case, go to the **Group Manager Approval** drop-down list. The following options are available:
   - **Approved**: If approved, the contact profile is sent to the **Manager** who is responsible for approving the contact profile for the department the employee belongs to.
   - **Rejected**: If rejected, a notification is sent to the employee who created the contact profile and the process ends.



3. Click **Save** and then click **Complete Task**.

You have approved the contact profile as a group manager.

Approval by Department Manager

The **Manager**, who is responsible for the department to which the employee who created the contact profile belongs, receives a task to approve the contact profile, which is available through **My Page** → **My Tasks**. He or she also receives an email with the task details.

As the **Manager** for the department, open the task, review the contact profile, and select **Approved** from the **Department Manager Approval** drop-down list. Click **Save** and then click **Complete Task**.

You have approved the contact profile as a department manager.

Approval by Admin

The **Admin** receives a task to approve the contact profile, which is available through **My Page** → **My Tasks**. He or she also receives an email with the task details.

As the **Admin**, open the task, review the contact profile, and select **Approved** from the **Admin Approval** drop-down list. Click **Save** and then click **Complete Task**.

You have approved the contact profile as an **Admin**.

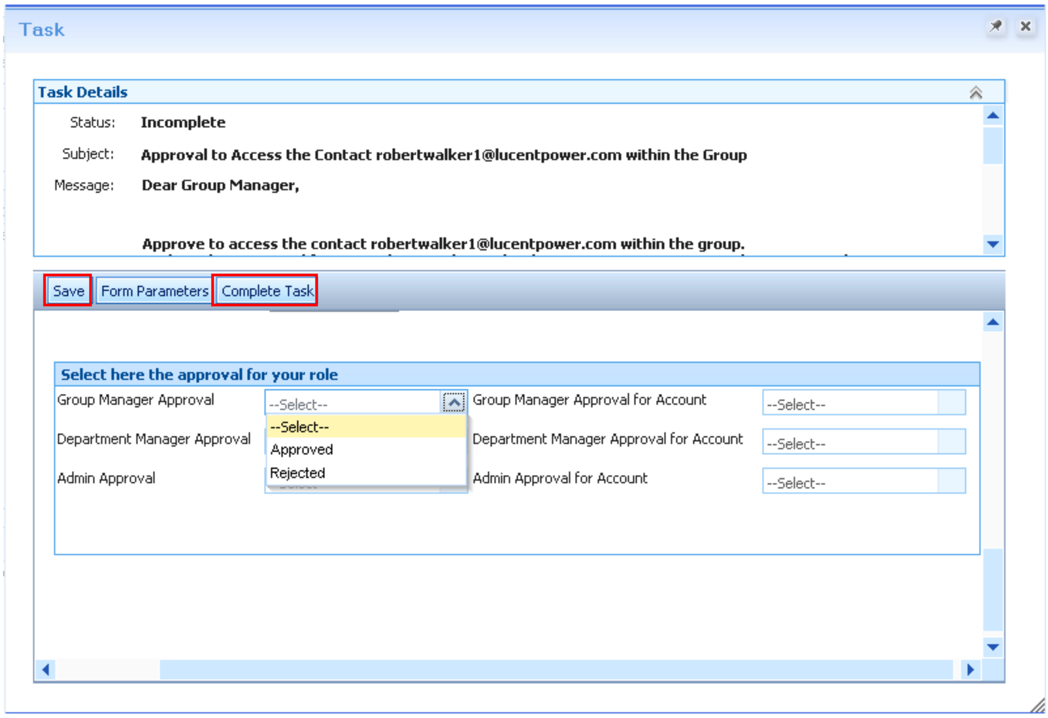
5.2 Privacy level – Open to Department

This privacy level enables the contact details to be seen by all the employees in a specific department. So, the contact profile needs to be approved by the managers of the group and department to which the employee who created the contact profile belongs.

Approval by Group Manager

The **Manager**, who is responsible for the group to which the employee who created the contact profile belongs, receives a task to approve the contact profile, which is available through **My Page → My Tasks**. He or she also receives an email with the task details. Do the following to review the contact profile and approve the task.

1. Double-click the task. The task opens, displaying the details of the contact profile.
2. Review the details and in the **Select here the approval for your role section**, select an option from the drop-down list that corresponds to your role. In this case, go to the **Group Manager Approval** drop-down list. The following options are available:
   - **Approved**: If approved, the contact profile is sent to the **Manager** who is responsible for approving the contact profile for the department the employee belongs to.
   - **Rejected**: If rejected, a notification is sent to the employee who created the contact profile and the process ends.



3. Click **Save** and then, click **Complete Task**.

You have approved the contact profile as a group manager.

Approval by Department Manager

The **Manager** who is responsible for the department to which the employee who created the contact profile belongs receives a task to approve the contact profile, which is available through **My Page → My Tasks**. He or she also receives an email with the task details.

As the **Manager** for the department, open the task, review the contact profile, and select **Approved** from the **Department Manager Approval** drop-down list. Click **Save** and then click **Complete Task**.

You have approved the contact profile as a department manager.

5.3 Privacy level – Open to Group

This privacy level enables the contact details to be seen by all the members of a specific group. So, the contact profile needs to be approved by the manager of the group to which the employee who created the contact profile belongs.

The **Manager**, who is responsible for the group to which the employee who created the contact profile belongs, receives a task to approve the contact profile, which is available through **My Page** → **My Tasks**. He or she also receives an email with the task details.

Do the following to review the contact profile and approve the task.

1. Double-click the task. The task opens, displaying the details of the contact profile.
2. Review the details and in the **Select here the approval for your role** section, select an option from the drop-down list that corresponds to your role. In this case, go to the **Group Manager Approval** drop-down list The following options are available:
    - **Approved**: If approved, the contact profile is created.
    - **Rejected**: If rejected, a notification is sent to the employee who created the contact profile and the process ends.
3. Click **Save** and then click **Complete Task**.

You have approved the contact profile as a group manager.

5.4 Privacy level – Private

This privacy level enables the contact details to be seen only by the employee who created the contact profile. If you have selected Private as the privacy level, there is no approval required. The contact profile is created automatically.

6. Creating a MashApp Account

Once the approval process is complete, the contact profile is created. If the employee who created the contact profile selects the check box for **Check to subscribe for MashApp**, then the approval process for creating a MashApp account starts.

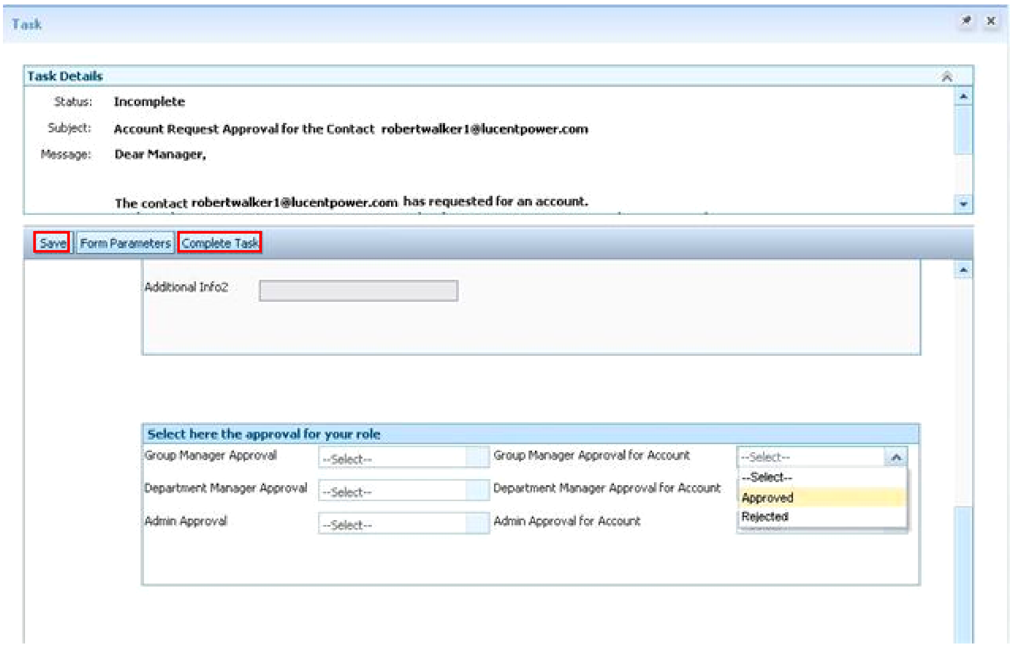
Approval by Group Manager

The **Manager**, who is responsible for the group to which the employee who created the contact profile belongs, receives a task to approve the MashApp account creation, which is available through **My Page** → **My Tasks**. He or she also receives an email with the task details.

Do the following to review the contact profile and approve the task.

1. Double-click the task. The task opens, displaying the details of the contact profile.
2. Review the details and in the **Select here the approval for your role** section, select an option from the drop-down list that corresponds your role. In this case, go to the **Group Manager Approval for Account** drop-down list The following options are available:
    - **Approved**: If approved, the approval task for MashApp account creation is sent to the **Manager** who is responsible for approving the MashApp account for the department the employee belongs to.

- **Rejected**: If rejected, a notification is sent to the employee who created the contact profile and the process ends.



3. Click **Save** and then, click **Complete Task**.

You have approved the MashApp account creation as a group manager.

Approval by Department Manager

The **Manager**, who is responsible for the department to which the employee who created the contact profile belongs, receives a task to approve the MashApp account, which is available through **My Page** → **My Tasks**. He or she also receives an email with the task details.

As the **Manager** for the department, open the task, review the details, and select **Approved** from the **Department Manager Approval for Account** drop-down list. Click **Save** and then click **Complete Task**.

You have approved the MashApp account creation as a department manager.

Approval by Admin

The **Admin** receives a task to approve the MashApp account creation, which is available through **My Page** → **My Tasks**. He or she also receives an email with the task details.

As the **Admin**, open the task, review the details, and select **Approved** from the **Admin Approval for Account** drop-down list. Click **Save** and then click **Complete Task**.

You have approved the MashApp account creation as an **Admin**.

Once the approval for the MashApp account is obtained from the concerned persons, the **Admin** assigns a task to the **Account Creator** to create a MashApp account

The **Account Creator** receives a task to create the MashApp account, which is available through **My Page** → **My Tasks**. He or she also receives an email with the task details.

As the **Account Creator**, open the task and in the **Account ID** field, provide a value. Click **Save** and then click **Complete Task**.

You have created the MashApp account as an **Account Creator**.

The employee who created the contact profile gets a confirmation via email that the MashApp account is created for the contact.

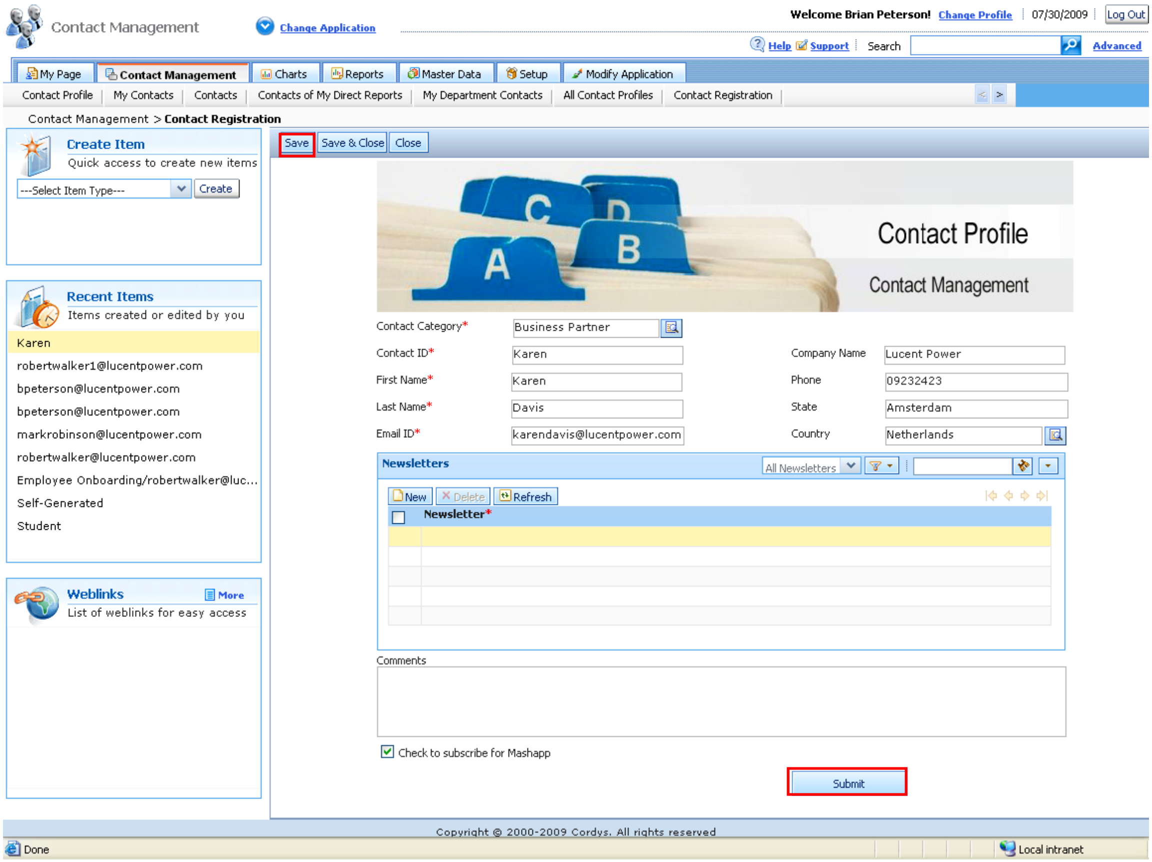
7. Creating a Contact Registration

The **Contact Registration** form is an anonymous form. Any external user can access this form; there are no security concerns. You can place this form on your organization's website to self-register for information on **Cordys Process Factory**.

Once you self-register through the **Contact Registration** form, your contact details will be stored in our **Contact Management** MashApp.

Do the following to create a **Contact Registration**.

1. Click the **Contact Management** tab.
2. Click **New** for **Contact Registration**. The **Contact Registration** form appears.
3. Click for **Contact Category**, select a contact category, and click **OK**.
4. In the **Contact ID** field, provide an ID for the contact.
5. In the **Email Id** field, provide an email address.
6. Provide other required information such as **First Name**, **Last Name**, etc.
7. Click **Save**.
8. In the **Newsletter Subscription Details** section, click **New** to add a newsletter.
9. Click for **Newsletter**, select the newsletter for which you want to subscribe the contact, and click **OK**.
10. If you want a MashApp account to be created for the contact, select the check box for **Check to subscribe for MashApp**.



11. Click **Save**.
12. Click **Submit**, if you selected the check box for **Check to subscribe for MashApp**.

You have submitted a contact registration successfully.

Approval by Admin

If you selected the check box for **Check to Subscribe for MashApp** while creating the contact registration, then approval is required from the **Admin** for the MashApp account creation.

The **Admin** receives a task to approve the MashApp account creation, which is available through **My Page → My Tasks**. He or she also receives an email with the task details.

As the **Admin**, open the task, review the details, and select **Approved** from the **Admin Approval for Account** drop-down list. If you want the contact details to be verified, select the check box for **Need Verification from Account Verifier**. Click **Save** and then click **Complete Task**.

You have approved the MashApp account creation as an **Admin**.

On approval by the **Admin**, a task is sent to the **Account Verifier** if the check box for **Need Verification from Account Verifier** was selected by the **Admin** during the approval process.

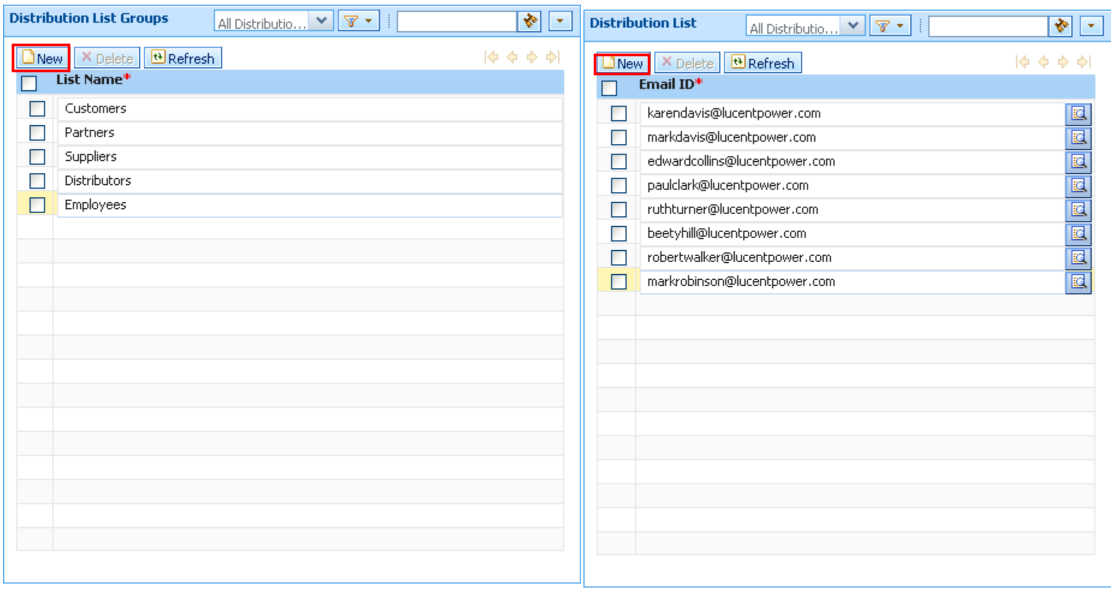
The **Account Verifier** verifies if an account can be created for the external contact. Once the verification is complete, a task is assigned to the **Account Creator** who creates the MashApp account.

8. Creating a Distribution List

A **Distribution List** is a function, which allows you to maintain a list of email addresses, which can be used to email everyone on the list in a single go.

Do the following to create a distribution list.

1. Click the **Contact Management** tab.
2. Click **View** for **Distribution List**. The **Distribution List** form appears.
3. In the **Lists** section, click **New**.
4. In the **List Name** field, provide a name for the list.
5. In the **Distribution List** section, click **New** to add email addresses to the list.
6. Click for **Email ID**, select an email address for a contact, and click **OK**. Repeat this step to add more email addresses.



7. Click **Save & Close**.

You have created a distribution list successfully.

9. Selecting a Message Template

A **Message Template** is used to send a notification or task to an individual or a group of individuals

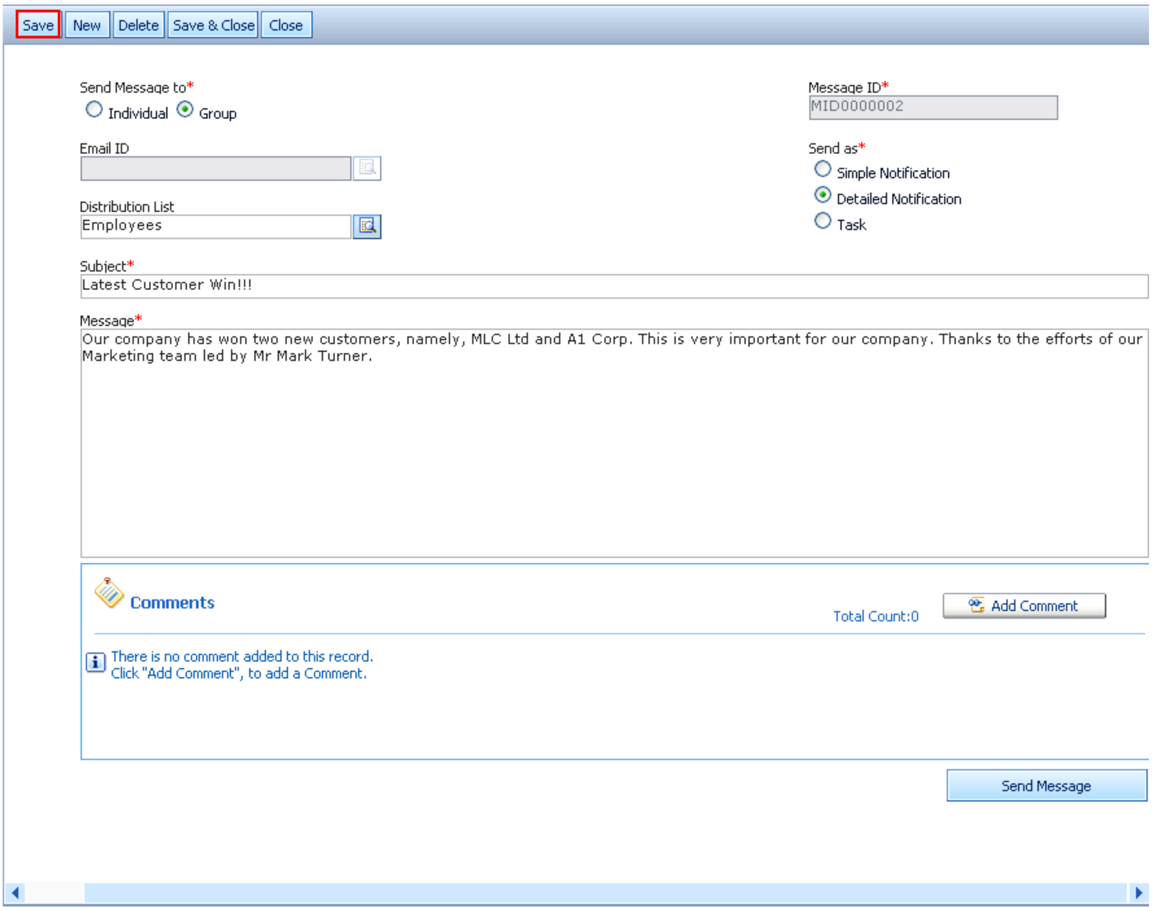
Do the following to select a message template.

1. Click the **Contact Management** tab.
2. Click **New** for **Message Template**. The **Message Template** form appears.
3. Select one of the following options for **Send Message to**.
   - **Individual**: The message is sent to a single recipient. If you select **Individual**, the **Email Id** field becomes active and you can select the email address of the recipient.
   - **Group**: The message is sent to multiple recipients. If you select **Group**, the **Distribution List** field becomes active and you can select a distribution list.
4. Select one of the following options for **Send as**.

> ***Note**: If you select the **Send as** option as either **Detailed Notification** or **Task**, then only **Comments** section will appear.*

- **Simple Notification**: This is a brief notification.
- **Detailed Notification**: This is a detailed notification, where you can add comments and attach files.
- **Task**: This is a task, which is to be performed by the receiver.

5. In the **Subject** field, provide the subject of the message.
6. In the **Message** field, provide the text for the message.
7. If you need to add any comments, do the following.
   a. Click **Add Comment**. The **Comment** form appears.
   b. Provide a **Comment Title** and provide text for the comment. You can also click **Add Attachment** to add attachments to the comment, if required.



8. Click **Save**.
9. If you selected either **Simple Notification** or **Detailed Notification**, click **Save & Close** or else, click **Send Task**.

You have selected a message template successfully.

10. Reporting and Monitoring

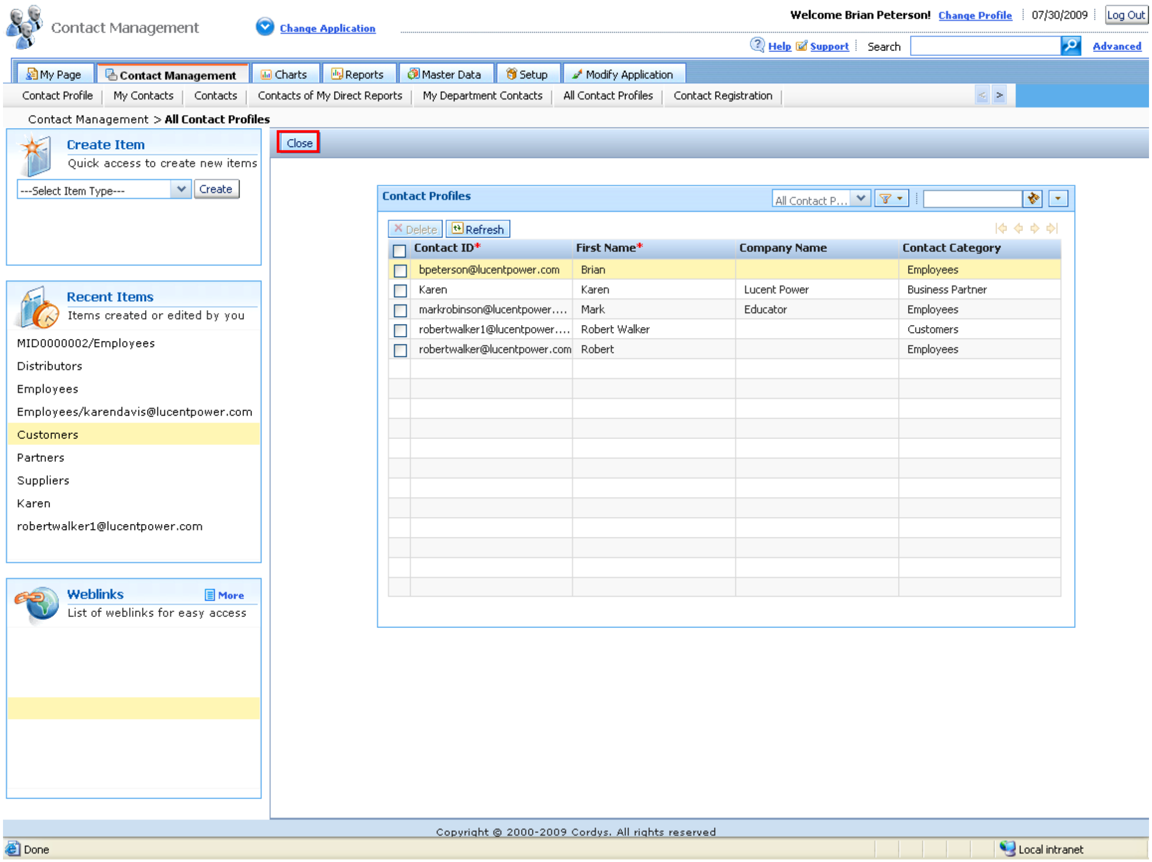
The **Contact Management** MashApp enables you to monitor contact data through various forms, charts, and reports.

10.1 Forms

On the **Contact Management** tab, you can view forms to display data on the contact profiles that were submitted.

For example, you can view the **All Contact Profiles** form to view all the contacts created within the organization. Do the following.

1. Click the **Contact Management** tab.
2. Click **View** for **All Contact Profiles.** The **Contact Profiles** form appears, displaying the details of all the contacts created within the organization.



3. Click **Close**.

You can also view the following forms on the **Contact Management** tab:

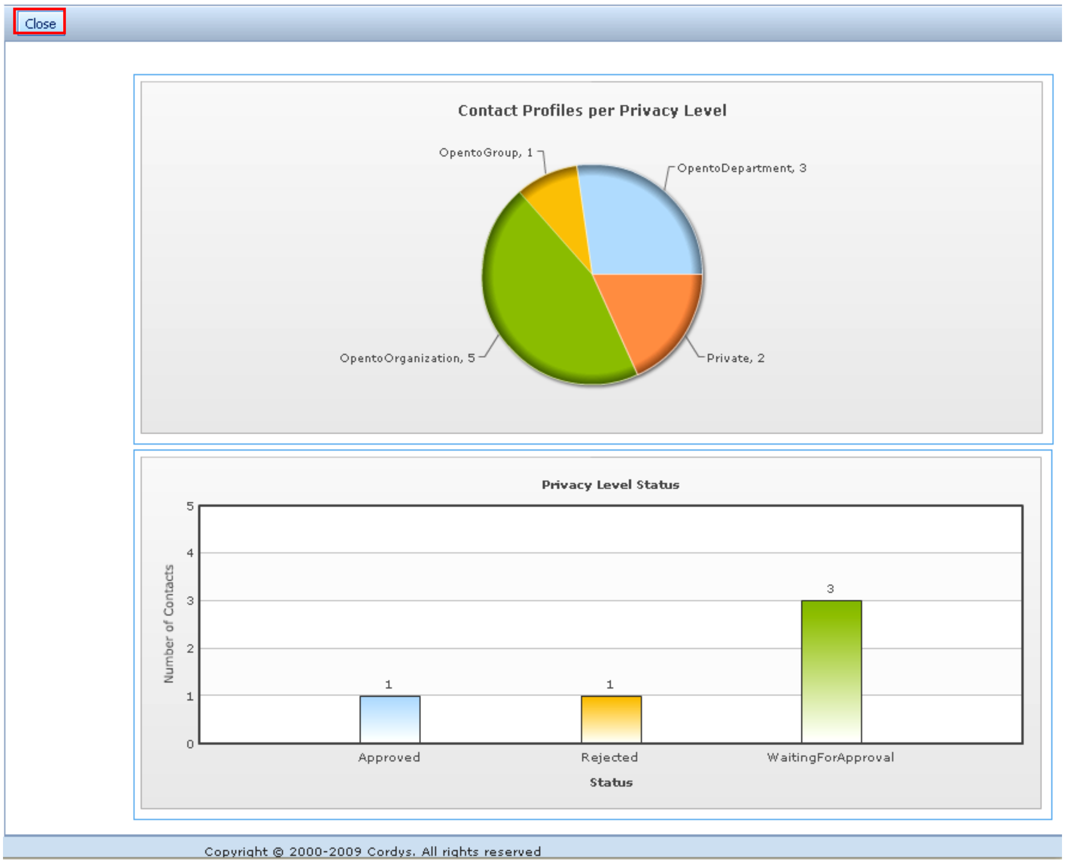
- **My Contacts**
- **Contacts**
- **Contacts of My Direct Reports**
- **My Department Contacts**
- **All Contact Registrations**

10.2 Charts

On the **Charts** tab, you can view charts that display contact data.

For example, you can view the **Contact Profiles per Privacy Level** chart to view the number of contact profiles per privacy level. Do the following.

1. Click the **Charts** tab.
2. Click **View** for **Contact Profiles per Privacy Level**. The **Contact Profiles per Privacy Level** chart appears, displaying the number of contact profiles per privacy level.
3. Click any privacy level. For example, **Open to Organization**. The status and number of contact profiles under this privacy level are displayed.



4. Click **Close**.

You can also view the following charts on the **Charts** tab:

- **Contact Profiles per Category**
- **Contact Profiles per Period**
- **Registered Contacts per Year**

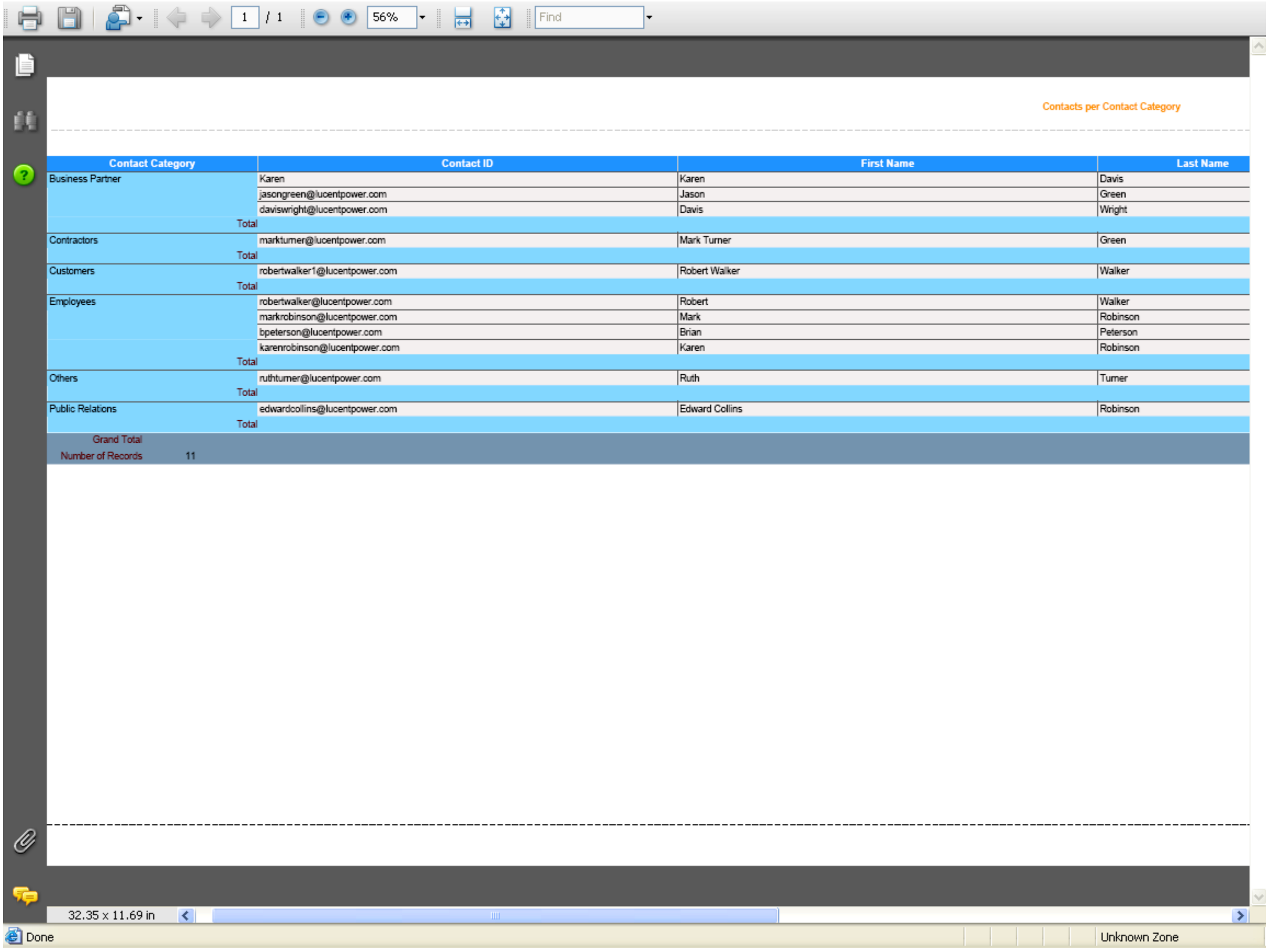
10.3 Reports

On the **Reports** tab, you can run various reports on contact profile data.

For example, you can run the **Contacts per Contact Category** report to view all the contacts per contact category. Do the following.

1. Click the **Reports** tab.
2. Click **Run** for **Contacts per Contact Category**. The **Report Wizard** appears.
3. Click **Run Report**.

4. Then, click **Download Report**. The report appears, displaying the contacts per contact category.



Contacts per Contact Category

Contact Category	Contact ID	First Name	Last Name
Business Partner	Karen	Karen	Davis
	jasongreen@lucentpower.com	Jason	Green
	daviswright@lucentpower.com	Davis	Wright
Total			
Contractors	markturner@lucentpower.com	Mark Turner	Green
Total			
Customers	robertwalker1@lucentpower.com	Robert Walker	Walker
Total			
Employees	robertwalker@lucentpower.com	Robert	Walker
	markrobinson@lucentpower.com	Mark	Robinson
	bpeterson@lucentpower.com	Brian	Peterson
	karenrobinson@lucentpower.com	Karen	Robinson
Total			
Others	ruthturner@lucentpower.com	Ruth	Turner
Total			
Public Relations	edwardcollins@lucentpower.com	Edward Collins	Robinson
Total			
Grand Total			
Number of Records 11			

You can also view the following reports on the **Reports** tab:

- **Registered Contacts per Business Partner**
- **Registered Contacts per Country**
- **Contacts per Business Partner**
- **Contacts per Country**

11. Conclusion

In this user manual, you learnt how to set up organization and **Master Data** for the successful functioning of the **Contact Management** MashApp. You learnt how to create a contact profile and approve it. You also learnt how to approve a MashApp account. You even got a glimpse on how to monitor data through various forms, charts, and reports that are readily available to you.

12. Contact Us

To report issues or send feedback, contact us at: customercare@theprocessfactory.com