Trimble Unity Construct - Contacts Guide

September 2024

Table of Contents

Contacts

e-Builder's Contacts module provides a centralized directory of contacts for all of your projects. By storing the information in e-Builder, you are able to report on and view at a glance all of your cost and bidding information for each company and contact. You can also use this information with the Mail Merge feature to automatically merge existing contacts into your defined contract or invoice templates.

The Contacts module ties in with both the Cost and Bidding modules. Each commitment and cost is tied to a company stored in your contacts. In the Bidding module, each bidder is a contact.

Key Concepts of Contacts

The following concepts are used within e-Builder:

- **Project**: Each real world project that your organization is participating in must be associated with a project in e-Builder. Your Project Administrator or Manager will be able to add you as a member of a project in e-Builder if you are working on it.
- **Contact**: An e-Builder contact is a record of contact information (such as phone number, fax, email address, street address, etc.) associated with an e-Builder Company. Contacts can be stored solely as a reference or associated with Bids in the bidding module.
- **Company**: An e-Builder company is a record of contact information (such as phone number, fax, email address, street address, etc.) for a company. There can be more than one contact associated with a company but only one company can be associated with a contact. Companies can be stored solely as a reference or associated with commitments, or costs or bids in the Cost and Bidding modules.
- **Groups**: Setting up a group of people(users and contacts) allows you to consistently send communication to the same collection of people when needed. These groups can be created for personal use or shared with all users.

Access the Contacts Module

e-Builder supports the different team members that are involved in any project. Based on their job function, users may be able to view and/ or edit/ enter Contacts.

> **Note:** The Site Administrator controls who has access to view and edit information in the Contacts Module.

To access the Contacts module

1. From the top navigation tabs, click the **Contacts** tab.
   The Contacts tab is displayed with a list of available contacts.

2. To view companies, click the **Companies** tab.

3. To view groups of contacts, click the **Groups** tab.

Search/ Lookup Companies and Contacts

To search and find companies and contacts you can either search through the pages in your view(s) or click the **Lookup** button.

To search for companies and contacts in views

1. Go to Contacts.
2. Click the **Contacts** tab or **Companies** tab. The views display a list of all the contacts or companies.
3. Click the down arrow to the right of the page drop-down list or click the First, Prev, Next and Last links.
   - The First link will direct you to the first page in the view.
   - The Prev link will direct you to the previous page.
   - The Next link will direct you to the next page.
   - The Last link will direct you to the last page in the view.
4. Click the name of a contact or company to view the details. This allows you to continue to filter or click different contacts and not have to close the lookup window.

Import Companies or Contacts

If you have been granted the permission, you can import companies or contacts directly into the Contacts module from a Microsoft Excel spreadsheet (.xls or .xlsx format).

Note: To see this import functionality on your Project Contacts screen, this feature must be enabled. Consult your account administrator for details.

Import File Preparation

- It is recommended that you name each of the column headers in your import file to the same field name for the company or contact in e-Builder. By doing this, the fields will map automatically and save you time on Step 2 of the Import Wizard.
- If you have contact information you wish to import that does not have a company field, you can create that field as a custom field. Custom field values can also be included on the import file.

   Tip: For check box type fields, use the following values in the Import Excel file:
   - Check box On = 1, Yes, or Y
   - Check box Off = 0, No or N
   - No change = blank

- If your import file has both company and contact information, choose the radio button where each row is a contact. When the import occurs, if the company already exists it on the list it will only import it once.
- During the Import process, you will need to specify whether you wish to do a new import of contacts/ companies or an update import that updates any existing duplicate records.

Types of Import Processes

There are two types of import processes:

- **New Import**: To perform a new import of contacts/ companies, leave the **Update Duplicates** check box unchecked in the **How is your import file organized?** field.
  - ○ **Company**: The import process checks the company numbers from the import file against the existing records in e-Builder. If the number does not exist, then a new company record will be created. Otherwise it will be returned as a duplicate and fail to be included in the import.
  - ○ **Contact**: The import process checks the company number, contact first and last name to determine whether the contact already exists.
- **Update Import**: To perform an update import, select the **Update Duplicates** check box in the **How is your import file organized?** field.
  - ○ **Company**: For records where the company number matches, the import process updates the existing record in e-Builder based on field differences, additions and/ or deletions in the import file. If the company number is not found, the process will also verify the company name for matches.

    Warning: The company number cannot be updated through the import.

  - ○ **Contact**: For records where the company number, first name and last name match, the import process updates the existing record in e-Builder based on field differences, additions and/ or deletions in the import file.

    Warning: The contact's company number, first name and last name cannot be updated through the import.

To import companies or contacts

1. Go to Contacts.
2. Click **Import Contacts**. The Import Contacts - Select Import File page is displayed with a 3-step wizard.
3. Complete Step 1 of the Import Wizard - select an import file:
   a. In the **How is your import file organized?** field, select the appropriate radio button to specify whether each row in your import file is a Company or a Contact.

      Note: If you choose the **Contact** option, you will have to perform field mapping selections for both companies and contacts in the next step.

   b. Select the **Update duplicates** check box to import and update any duplicate or existing records in e-Builder with company or contact name matches.
   c. In the **Choose Your Import File** section, click **Choose File** to locate your import file.
   d. Navigate to the folder where the file is located on your local computer or network. Select the file and click **Open**. The import file is now attached.
   e. Click **Next**. The Import Contacts - Field Mappings page is displayed.
4. Complete Step 2 of the Import Wizard - specify the field mappings:
   a. For each standard and custom field in e-Builder, click the drop-down arrow and select the column name from the import file to map them to the import file fields.

b. Once all fields are mapped correctly, click **Next**. The Import Contacts - Review page is displayed along with a preview of one of the imported records.

5. Complete Step 3 of the Import Wizard - review the import file:

   a. Validate that the field mapping performed in Step 2 of the Import Wizard is correct.

   > **Tip:** If there are any problems with your import file that caused certain rows not to import, you will see a count of the rows with issues on the Exceptions tab. Click the **Exceptions** tab to see the issue and the reason why that row was not imported. It is recommended that you cancel the import if your import file has exceptions to correct the exceptions. Once you cancel the import, correct the rows on the import files that had the errors and re-import the file.

   b. Click **Import**. The Import Contacts - Review page is displayed with a import confirmation message.

6. Click **Finish** to complete the import.

Export Companies or Contacts

If granted the permission, you can export companies or contacts directly from the Contacts module to a Microsoft Excel spreadsheet (.xls format).

> **Note:** Custom field values can also be included in the export file.

To export companies to MS Excel

1. Go to Contacts.
2. Click the **Companies** tab or **Contacts** tab.
3. Click the MS Excel icon . The MS Excel Spreadsheet will be downloaded to your computer.

   > **Tip:** To export a list of companies or contacts belonging to a specific project, select a project from the **All Projects** drop-down box first. If you wish to export the details of only few companies or contacts from this list, you can narrow down the list by clicking the check boxes beside the desired companies or contacts and then clicking the MS Excel icon .

Contact Information

Using the Contacts module you can access your companies or contacts. Click the Companies tab to access the list of companies and click the Contacts tab to access the list of contacts.

To filter and search for contacts

1. Go to Contacts.
2. Go to the Contacts tab.
3. Click **Lookup Contact**. The Lookup Contact popup window is displayed.
4. Specify search criteria in the fields.
5. Click **Filter**. The search results are displayed in a grid below the filter.

   > **Tip:** If no information is entered in the filter fields, all contacts will be displayed when the **Filter** button is clicked. Click **Clear** to clear the filter criteria entered.

6. Click the name of a contact to display the contact details in the main application window. This allows you to continue to filter or click different contacts and not have to close the lookup window.

To view the contacts for a specific project

1. Go to Contacts.
2. To display a list of contacts for a project, click the **All Projects** drop-down box. A list of projects will be displayed.
3. Select a project by clicking it. The contacts for the project that you have selected are displayed.

   Tip: Click letters of the alphabet, located below the filter area, to display contacts/ companies (depending on the page you are in) that begin with that letter.

To view a contact's details

1. Go to Contacts.
2. To view the details of a contact, click the required contact's first or last name from the list of contacts.
3. The Contact Details page is displayed with the information for the contact you have selected.
4. To print the contact information, click **Print**. A new browser window will open up with the Contact's Information. Click the **Print** button in this window and select your printer.

Working with Contacts

e-Builder allows you to add new contacts manually or import them. In cases where you have a new contact with similar information as an existing contact, such as two contacts from the same office of a company, it may be faster to copy an existing contact than to create a new one.

Note: Only users who have been assigned permissions by their e-Builder administrator can add contacts.

To add a contact

Note: Companies and Contacts are also automatically added when bidders are invited and/or awarded, if they are not already in the system. e-Builder provides you with the ease and flexibility of automatically adding the contact, company and associated details to the respective Project Contacts when you invite or award the bidder, to save you time and keystrokes, as well as eliminate duplicate work, reducing margin for error.

1. Go to Contacts.
2. To add a contact to e-Builder, click **Add Contact**.

   Note: Only users who have been assigned permissions by their e-Builder administrator can add companies or contacts.

3. On the Add Contact page, enter the contact information.
4. Click **Save**.

   Tip: If you have more than one entry to make, click **Save & Add** and you will be able to add another contact.

To edit a contact's details

1. Go to Contacts.
2. Click the required contact's first or last name from the list of contacts.
3. On the Contact Details page, click **Edit**.
4. On the Edit Contact page, make changes to the contact information fields as needed.
5. Click **Save**.

To copy a contact's details

1. Go to Contacts.
2. Click the required contact's first or last name from the list of contacts.
3. On the Contact Details page, click **Copy**.
4. On the Copy Contact page, enter the contact information for the new contact.

   Note: The first and last name fields are the only two that do not automatically copy.

5. Click **Save**.

To delete a contact

Note: You cannot delete a delete a contact that has funds committed to it in the cost module, or is a bidder in the bidding module.

1. Go to Contacts.
2. Click the required contact's first or last name from the list of contacts.
3. On the Contact Details page, click **Delete**. You will be asked to confirm the deletion.
4. Click **Yes, Delete the Contact** to confirm.

Add/ Edit Contact Information Fields

- **First Name**: The first name of the contact. This field is required. Choose a prefix for the contact from the drop-down list, if needed.
- **Last Name**: The last name of the contact. This field is required.
- **Company**: The name of the company that the contact is associated with. To chose the company, click the arrow and select a company from the drop-down list. If the company has not been created yet in e-Builder, then it must be entered manually. This field is required.
- **Company Number**: The number of the company that the contact is associated with. When adding
- **Title**: The title for the contact.
- **Department**: The company department that the contact belongs to.
- **Country**: The country where the contact is located.
- **Address**: The first line of the address where the contact is located.
- **Suite**: The suite number, if any, for the contact's location.
- **City**: The city where the contact is located.
- **State/ Province**: The state or province where the contact is located.

- **Zip/ Postal Code**: The postal code for the contact's location.
- **Primary Contact**: Select this check box to make the contact the primary contact for their company. If they are the only contact associated with a company then they are the primary contact by default. Designating a contact as the primary contact will display their name in the primary contact column of the Companies page.
- **Email**: The email address for the contact.
- **Phone**: The phone number for the contact.
- **Mobile Phone**: The mobile phone number for the contact.
- **Other Phone**: Any alternate phone number available for the contact.
- **Fax**: The fax details for the contact.
- **Pager**: The pager details for the contact.
- **Do Not Use?**: When selected, this check box will omit the contact from any bid communications.

Contact Information Buttons

- **Edit**: Click this button to edit the contact details.
- **Delete**: Click this button to delete the contact.
- **Copy**: Click this button to copy the contact.
- **Message History**: Click this button to view the Message History page for the contact.
- **Print**: Click this button to print the contact details.

Add Contact Page Buttons

- **Save & Add**: Click this button to save and create the new contact and then add another new contact.
- **Save**: Click this button to save the changes and create the new contact.
- **Cancel**: Click this button to cancel the changes and clear the fields.

Contact Information Tabs

The following tabs on the Contact Details page contain additional information about the contact:

> **Note:** The tabs for Bid Packages and Messages will only appear if the Bidding Module is turned on. The tabs for Commitments and Actual Costs will only appear if the Cost Module is turned on.

- **Custom Fields**: Displays the contact's information for the custom fields that have been created. If there is a field that needs to be added, please contact your e-Builder Administrator.
- **Invited Projects**: Displays all of the project bids that the contact has been invited to. The Invited Projects grid includes the project name, due date, the current status of the project bid, the bidding status of the company and whether or not a bid has been submitted. Each time the contact is invited to participate in a new project bid, a new row is automatically included in this grid.

  > **Note:** Click the drop down arrow in the box to the right of Bidding Status to view bids in a specific status. Click the drop down arrow in the box to the right of Bid Package Status to view either the open or closed project bids.

- **Construction Codes**: Displays which construction codes are assigned. Construction codes are a structured hierarchy of divisions and classification codes within each division that are used to standardize information in the construction industry.

  Tip: In e-Builder, construction codes are associated with companies and used for reporting purposes or to invite contacts in the Bidding module. The contacts automatically inherit the construction codes assigned to their company. If you want to manage the codes for this contact, you have to click the company name link and then click the construction codes tab for the company.

- **Notes**: Displays any notes for the contact. To add a note for the contact, click **Add Note**. After entering the note, click **Save** to retain it.

- **Documents**: Displays all of the documents that are associated with the contact (i.e. Insurance papers, pre-qualification letters, warranties). For more details on documents please see About the Documents Module. To attach a document to a contact profile, click **Attach Documents**. Click the drop down arrow and select the project. After selecting the project, you can filter for the document(s) that needs to be attached. You can either load document(s) from your computer or from e-Builder.

  Note: If you are loading documents from your computer you must also select an e-Builder folder to load it to. Click the Browse button to select the desired folder location. Remember, to associate a document to a contact, the file must reside in the document repository of a project.

  Tip: Click the Add Files button on the left grid to add files manually (one at a time) from your computer. You can also drag and drop the document(s) into this grid. Click the Add Files button on the right grid to manually add document(s) from the e-Builder document repository for the project. Click the Upload All Files button to load all documents and associate them to the contact.

- **Forms**: Tracks all communications between a vendor, client or consultant.

  Tip: To attach a form to a contact/ company profile, click the Attach Forms button. Click the drop down arrow and select the project. After selecting the project, you can filter for the form type that needs to be attached. Click the Attach button.

- **Processes**: Tracks all communications between a vendor, client or consultant.

  Tip: To attach a process to a contact profile, Click the Attach Processes button. Click the drop down arrow and select the project. After selecting the project you can filter for the process type that needs to be attached. Click the Attach button.

Company Information

In e-Builder, each company or contact is associated with any project that has costs with that company and/ or contact.

To filter and search for companies

1. Go to Contacts.
2. Go to the Companies tab.
3. Click **Lookup Company**. The Lookup Company popup window is displayed.
4. Specify search criteria in the fields.

5. Click **Filter**. The search results are displayed in a grid below the filter.

   Tip: If no information is entered in the filter fields then all companies will be returned when the **Filter** button is clicked. Click **Clear** to clear the filter criteria entered.

6. Click the name of a company to display the company details in the main application window. This allows you to continue to filter or click different companies and not have to close the lookup window.

To view the companies for a specific project

1. Go to Contacts.
2. To display a list of companies for a project, click the **All Projects** drop-down box. A list of projects will be displayed.
3. Select a project by clicking it. The companies for the project that you have selected are displayed.

To view a company's details

1. Go to Contacts.
2. To view the details of a company, click the required company's name from the list of companies.
3. The Company Details page is displayed with the information for the company you have selected.

Working with Companies

e-Builder allows you to add new companies manually or import them. You can also edit and delete a company's details if you have the required access permissions.

To add a company

Note: Companies and Contacts are also automatically added when bidders are invited and/or awarded, if they are not already in the system. e-Builder provides you with the ease and flexibility of automatically adding the contact, company and associated details to the respective Project Contacts when you invite or award the bidder, to save you time and keystrokes, as well as eliminate duplicate work, reducing margin for error.

1. Go to Contacts.
2. To add a company to e-Builder, click **Add Company**.

   Note: Only users who have been assigned permissions by their e-Builder administrator can add companies or contacts.

3. On the Add Company page, enter the company information.
4. Click **Save**.

   Tip: If you have more than one entry to make, click **Save & Add New** and you will be able to add another company.

To edit a company's details

1. Go to Contacts.
2. To edit a company's details, click the company name listed in the Company Name column on the Contacts or Companies tab.

3. On the Company Details page, click **Edit**.

4. On the Edit Company page, make changes to the company information fields as needed.

5. Click **Save**.

> **Tip:** If there are contacts associated with a company and you edit the address or phone, then you will be given the choice to also update the associated contacts with the same changes. Select the check boxes beside the fields to be updated for the contacts and click **Yes, Update Company and Contacts**. To only update the company, click **No, Update Company Only**.

To delete a company

> **Note:** You cannot delete a company that has funds committed to it in the cost module, or has contacts from the company bidding in the bidding module.

1. Go to Contacts.

2. To edit a company's details, click the company name listed in the Company Name column on the Contacts or Companies tab.

3. On the Company Details page, click **Delete**. You will be asked to confirm the deletion.

4. Click **Yes, Delete the Company** to confirm.

> **Tip:** If you have tried to delete a company that has funds committed to it in the Cost Module, or has contacts from the company bidding in the Bidding Module, you will be unable to do so and will receive an notification message asking you to remove the connections first and then try to delete the company.

Add/ Edit Company Information Fields

- **Company**: The name of the company. This field is required.
- **Country**: The country where the company is located.
- **Address**: The first line of the address where the company is located. Click **view map** to preview the address location using Google Maps.
- **Suite**: The suite number, if any, for the company's location.
- **City**: The city where the company is located.
- **State/ Province**: The state or province where the company is located.
- **County**: The county where the company is located.
- **Zip/ Postal Code**: The postal code for the company's location.
- **Company Number**: Click **Generate** to automatically generate a company number. You must first enter a name for the company in the **Company** field before you use this feature. This field is required.
- **Phone**: The phone number for the company.
- **Fax**: The fax details for the company.
- **Website URL**: The URL of the company's website.
- **Classifications**: The type of business certification or classification that the company qualifies for. The following options are available for selection:

- **WBE**: Women's Business Enterprise
- **MBE**: Minority Business Enterprise
- **DBE**: Disadvantaged Business Enterprise
- **VBE**: Veteran-Owned Business Enterprise
- **SBE**: Small Business Enterprise
- **Other**: Other Business Enterprise types

- **Is Prequalified?**: Pre-qualified is a check box for informational purposes. It can be checked to let other users know that this company has already been qualified for their work.
- **Do Not Use?**: When selected, this check box will omit the company from any bid communications.
- **Active**: Indicates whether the company is currently active.

Company Information Page Buttons

- **Edit**: Click this button to edit the company details.
- **Delete**: Click this button to delete the company.
- **Add Company**: Click this button to add a company.
- **Add Contact**: Click this button to add a contact.
- **Message History**: Click this button to view the Message History page for the company.

Add Company Page Buttons

- **Save**: Click this button to save the changes and create the new company.
- **Save & Add Construction Codes**: Click this button to save and create the new company and then add construction codes.
- **Save & Add New**: Click this button to save and create the new company and then add another new company.
- **Cancel**: Click this button to cancel the changes and clear the fields.

Company Details Tabs

The following tabs on the Company Details page contain additional information about the company:

Note: Based on your viewing privileges, you will be able to access one or more of the above mentioned tabs. If you do not have access, the display for that item/ those items will be blank. The Bidding tab will be displayed only if the Bidding Module has been enabled for the account. The tabs for Commitments and Actual Costs will be displayed only if the Cost Module is enabled.

Tip: Click a tab name to see the information it holds. The number in parentheses indicates the number of entries for the tab.

- **Actual Costs**: Displays all of the actual costs across all projects for the company.

  Tip: To view the actual costs for a specific project click the drop-down arrow in the box that shows All Projects and select the name of the project that you want to see the actual costs for. To view the details of an actual cost click the link in the Invoice # column. If there is a commitment associated with the actual cost click the link in the Commitment # column to view its details. You can also add an invoice for the company by clicking the Add Invoice button.

- **Bidding**: Displays the projects on which this company had bid, if any.
- **Commitments**: Displays all of the commitments across all projects for this company.

  Tip: To view the commitments for a specific project click the drop down arrow in the box that shows All Projects and select the name of the project that you want to see the commitments for. To view the details of a commitment, click the link in the Commitment Number column.

- **Contacts**: Displays the contacts associated with this company.

  Tip: To view the details of a contact click the link in the **Name** column. To send an e-mail to the contact click the link in the **Email** column. To add another contact for the company click **Add Contact** and enter the new contact's information. See Contact Information for more details.

- **Construction Codes**: Displays which construction codes are assigned. Construction codes are a structured hierarchy of divisions and classification codes within each division that are used to standardize information in the construction industry. In e-Builder, they are associated with companies and used for reporting purposes or to invite contacts in the Bidding module.

  Note: Each contact associated with the company automatically inherits the construction codes assigned. This benefits you when building out your potential and invited bidder lists. When searching for a code when creating a bidder list only those contacts (in those companies) that have that construction code is returned and eligible to be invited.

  Tip: If granted the permission to edit companies, then you can assign construction codes to a company by clicking the **Manage Codes** button on the Construction Codes tab. Click the different codes to filter those results in the left grid, to assist in narrowing down the results. Or simply find the codes you want to assign to the company and click the Add button. When a code or set of codes are added they automatically show in the Selected Construction Codes grid (right grid). Filter for specific descriptions or codes by entering the search in the Filter box. Click the Clear button to clear the search. Click the Save button when you are done and want to save those codes added to the company.

- **Custom Fields**: Displays the company's information for the custom fields that your e-Builder Administrator has created. Please contact them if there is a field that needs to be added.
- **Documents**: Displays all of the documents that are associated with the company (i.e. Insurance papers, pre-qualification letters, warranties). For more details on documents, see Documents. To attach a document to a contact/ company profile, click the Attach Documents button. Click the drop down arrow and select the project. After selecting the project, you can filter for the document(s) that needs to be attached. You can either load document(s) from your computer or from e-Builder. If you are loading documents from your computer you must also select an e-Builder folder to load it to. Click the

Browse button to select the desired folder location. Remember, to associate a document to a company the file must reside in the document repository of a project. Click the Add Files button on the left grid to add files manually (one at a time) from your computer. You can also drag and drop the document(s) into this grid. Click the Add Files button on the right grid to manually add document(s) from the e-Builder document repository for the project. Click the Upload All Files button to load all documents and associate them to the company.

- **Forms**: Displays any forms attached to this company. The Forms tab helps to track all communications between a vendor, client or consultant.

  Tip: To attach a form to a contact/ company profile, click the **Attach Forms** button. Click the drop down arrow and select the project. After selecting the project you can filter for the form type that needs to be attached. Click the Attach button.

- **Invited Projects**: Displays all of the project bids that the company has been invited to. For more details on bidding, see Bidding.

  Tip: The Invited Projects grid includes the project name, contact invited, the current status of the project bid, the bidding status of the company and whether or not a bid has been submitted. For each time a contact for this company is invited to participate in a new project bid a new row is automatically included in this grid. Click the project name link to route to the project bid. Click the contact name to route to the details of that contact. Use the Bidding Status drop-down box to view bids in a specific status. Use the Status drop-down box to view either the open or closed project bids.

- **Notes**: Displays any notes that have been saved for this company.

  Tip: To add a note for the company click **Add Note**. After you have entered the note, click **Save**.

- **Processes**: Displays any processes defined for and attached to this company.
- **Projects**: Displays the projects associated with this company.

Groups

e-Builder allows you to create groups of people (users and contacts) for easy assignments throughout the system.

Setting up a group allows you to consistently send communication to the same collection of people when needed. These groups can be created for personal use or shared with all users.

To access groups

1. From the top navigation tabs, click the **Contacts** tab.

2. To view groups of contacts, click the **Groups** tab. All available groups are displayed.

Groups Tab

From the Contacts module, you can access the Groups tab where groups can be set up, viewed, and edited.

To create a group

1. From the top navigation tabs, click the **Contacts** tab.
2. To view groups of contacts, click the **Groups** tab.

3. Click **Add**.

4. On the Add Group page, complete all the necessary fields:

   ○ **Choose Name**: Enter a name for the group. This field is required.

   ○ **Group ID**: Enter a unique identifier for the group. While more than one group can have the same name, the ID must be unique. This field is required.

   ○ **Description**: Enter a description for the group.

   ○ **Available**: From this drop-down list, select the projects that the group is available for.

   ○ **Privacy**: Select who can view the group.

   ○ **Add Members**: Specify the members to be assigned to the group. Click **Lookup** to access the Lookup window where you can view a list of all the contacts and users.

      ▪ Here, you can select multiple people from the list to add to the group.

      ▪ You can also narrow down the results by entering data into the fields or by selecting the **Users Only** or **Contacts Only** check boxes at the top of the page.

      ▪ You can also leave all filtering blank to display all options. Click **Filter** to populate the list.

         Note: The list will not populate until the **Filter** button has been clicked.

      ▪ Select the members to add to the group and select **Insert Selected**.

         Note: Members without email addresses will not be displayed on the group list.

5. Click **Save**. The group will be created and will be displayed on the **Groups** tab.

To edit a group

1. From the top navigation tabs, click the **Contacts** tab.

2. To view groups of contacts, click the **Groups** tab.

3. Click **Edit** beside the group you wish to modify.

4. On the Edit Group page, complete all the necessary fields:

   ○ **Choose Name**: The name for the group. This field is required.

   ○ **Group ID**: A unique identifier for the group. While more than one group can have the same name, the ID must be unique. This field is required.

   ○ **Description**: A description for the group.

   ○ **Available**: The projects that the group is available for.

   ○ **Privacy**: The visibility of the group to other users.

   ○ **Add Members**: Specify the members to be assigned to the group. Click **Lookup** to access the Lookup window where you can view a list of all the contacts and users.

      ▪ Here, you can select multiple people from the list to add to the group.

      ▪ You can also narrow down the results by entering data into the fields or by selecting the **Users Only** or **Contacts Only** check boxes at the top of the page.

      ▪ You can also leave all filtering blank to display all options. Click **Filter** to populate the list.

> **Note:** The list will not populate until the **Filter** button has been clicked.

- Select the members to add to the group and select **Insert Selected**.

  > **Note:** Members without email addresses will not be displayed on the group list.

5. In the Members section, click **Remove** beside the name of any member you wish to remove from the group.
6. Click **Save**. The group will be updated with your changes.

To delete a group

1. From the top navigation tabs, click the **Contacts** tab.
2. To view groups of contacts, click the **Groups** tab.
3. Click **Delete** beside the group you wish to delete.

   > **Note:** Deletion is only available on groups that you have created. Admin set up groups will be read-only for users who are not administrators.

4. You will be asked to confirm the deletion. Click **Yes** to proceed with permanently deleting the group.

Apply a Group

Groups can be applied to multiple places: Calendar Events, Process Instances, Recipients of Reports, Submittals, and other communications throughout the software.

Enter the name or part of the name in the recipient field (where permitted) and then the group name will be populated in the list.

For example, you can apply a group to a Calendar event.