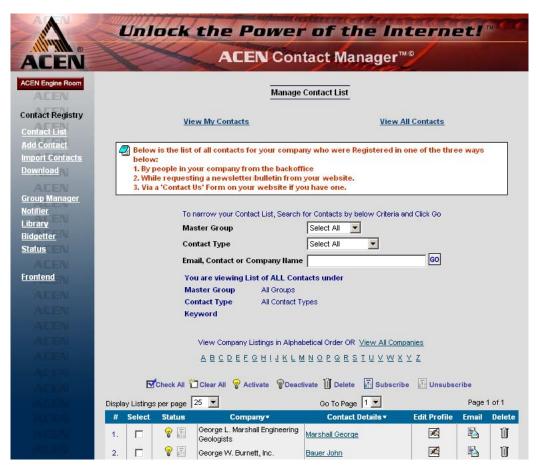
I. ACEN® Contact Manager™

The Contact Manager™ is perhaps the most powerful and important component of your ACEN Working Website™. Other Working Website™ Tools (such as Library™, Notifier™, BidGetter™, and Portfolio™) use the Contact Manager database as a foundation to exchange information with your clients, customers, suppliers, employees, or associates. The database makes your website work for you. All with a minimum of effort on your part. What's more, as with all ACEN Tools, there's no technical knowledge required.

The secret to the Contact Manager's power is its flexibility. You decide what you want. You customize your contact database according to your own unique requirements. You adapt it as your needs change. By creating different groups and categories, you determine how information is shared—to empower your employees, inform your suppliers, and attract customers.



The main Contact List page.

Overview

The Contact Manager consists of two parts:

- 1. the Contact Registry, the place where you add, edit, import, delete, and download contacts; and
- 2. the **Group Manager**, the place where you create various groups/categories and assign contacts to each.

The Working Website™ Tools that use the contact database are:

- Library[™], a tool to post and share documents and information in a variety of useful ways;
- 2. **Portfolio**™, where you can post your best work for the world to come and see, and target the most important folks—your customers and contacts;
- 3. **Notifier**™, a place to store your news, bulletins, and events, and broadcast them to your contacts; and
- BidGetter™, where you can easily post and track your job bidding online.

Definitions

Before we go further, let's demystify some jargon with a few definitions:

Contact is an individual associated with your website or business, such as a client, customer, or supplier (you decide how to classify your contacts). A contact is eligible to receive news and information about your company via your ACEN Working Website™ Tools. Typically, contacts manage their own accounts, deciding what options they do and don't want.

Master Group is a basic database category (such as "employee" or "customer") that you assign. A Master Group should be a very general category, as it is common to all Working Website™ Tools.

Contact Type refers to how the contact was entered into the database. Typically, a contact is entered in one of three ways:

- 1. the individual fills-out and submits the "Registration" form on your website, so that he/she can receive newsletters/bulletins from your website (this is the most common method; requiring no action from you);
- 2. the individual submits the "Contact Us" form on your website, which automatically adds his/her information to the contact database (again, this requires no action on your part); or
- 3. someone in your company (a "BackOffice Administrator" authorized to add/edit the contact list) enters the information individually or imports it from an electronic list.

1. Contact Registry

The Contact Registry enables you to view, add, edit, import, delete, and download contacts.

The Contact List

To view your contacts, click on the Contact List link. The default view is all contacts [posted by you]. To view contacts in other ways, select the view options you want, then click "Go." The new list will appear in a refreshed page. View options are defined below:

View My Contacts lists only contacts posted by you.

View All Contacts lists all contacts.

Master Group limits the list to only the selected Master Group, or choose < Select All > to view all groups. (See definition of *Master Group* above.)

Contact Type limits the list to only the selected Contact Type, or choose < Select All > to view all types. (See definition of *Contact Type* above.)

E-mail, Contact, or Company Name limits the list to the keyword(s) you type.

Alphabetical Order lists contacts starting with the letter you click (A–Z), sorted in alphabetical order by Company Name.

View All Companies lists all contacts on a single page, in alphabetical order by Company Name.

Display Listings Per Page controls the number of contacts displayed (25, 50, 75, or 100).

Go To Page allows you to conveniently jump to any page in the contact list.

Prev/Next if visible, click to go to the next page or previous page.

The Contact List Toolbar

The Contact List includes a toolbar that allows you to edit and manipulate the contacts in the list:



Contact List toolbar.

You can modify individual contacts directly, or modify multiple contacts at once. The principle is this: to modify an individual contact, click on the desired icon in that contact's row; to modify multiple contacts, select the contacts that you want to modify, and then click on the desired icon in the toolbar.



Example Contact List.

For example, if we want to delete Mr. George Marshall (see figure above), we simply click on the "trashcan icon" if under the Delete column in that same row. If we want to delete both George Marshall and John Bauer, we select these two contacts by checking *both* checkboxes (under the Select column) and then clicking "Delete" in the Toolbar (see figure above).

Here are some definitions:

Check All selects all contacts *displayed on this page* (not all contacts in the database)

Clear All clears the checkboxes of all the displayed items.

Activate makes the selected contacts "active," so the contact can login to the website, receive e-mail, etc.

Deactivate makes the selected contacts "invisible" or "inactive," so that the contact cannot login to the website, receive e-mail, etc. This is a convenient way to temporarily "shut-off" an account.

Delete permanently removes the selected contacts from the database (as in our example above).

Subscribe enrolls the selected contacts in the newsletter feature, so the contact gets e-mail newsletters.

Unsubscribe removes the selected contacts from the e-mail newsletter service.

Contact List Column Labels

The header on the Contact List table contains the labels for each column:



Contact List column headers.

The small arrows next to "Company" and "Contact Details" indicate that the list can be sorted by these two categories. To change the sort, click on the column title itself.

Clicking on the linked text under the **Contact Details** column displays the contact's account summary (as below):



Account Summary.

Adding/Editing A Contact

To add a contact, click on the "Add Contact" link at left:



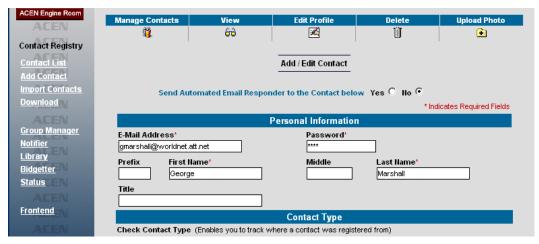
Adding a contact.

To *edit* an existing contact, click on the "hand" icon (under the Edit Profile column) of the contact you wish to edit:



Editing a contact.

The contact information form will be displayed:



Contact information form.

You may now add/edit the appropriate items on the form.

Editing Toolbar

If you are editing an existing contact, a toolbar will appear at the top of the page:



Contact List column headers.

This performs many of the functions of the Contact List Toolbar (see related section above). The functions are defined as follows:

Manage Contacts takes you to the main Contact List page (see section above).

View displays a profile/summary of the contact, along with assigned groups and other account information.

Edit Profile displays the Edit Contact form.

Delete permanently deletes the currently displayed contact.

Upload Photo enables a picture (usually a photo or a company logo) to be uploaded to the database.

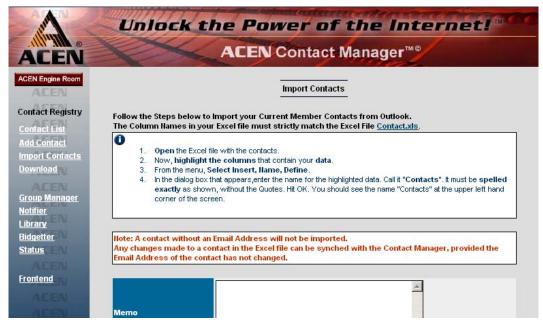
Importing Contacts

If you have a large list of contacts stored in a database or spreadsheet file, you can import them to your Contact Registry database. (If you have not already done so, your contact list must be converted to Microsoft Excel format.) Click on the "Import Contacts" link at left:



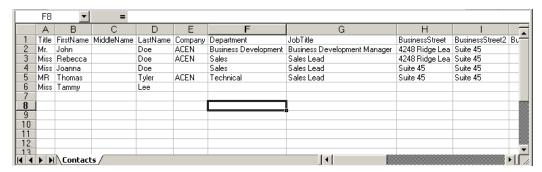
Importing contacts.

The Import Contacts form will be displayed:



Import Contacts form.

In order to function properly, the Excel file that you import must be in a specific format. For your convenience, an example Excel spreadsheet file is provided. Click on the "Contact.xls" link at the top of this page to open the example file:



Example Excel file.

The column names in your contact list must match those in the "Contact.xls" file. To successfully modify and import your contact list, be sure to closely follow the instructions on this page.

* **Note**: contacts without e-mail addresses will **not** be imported.

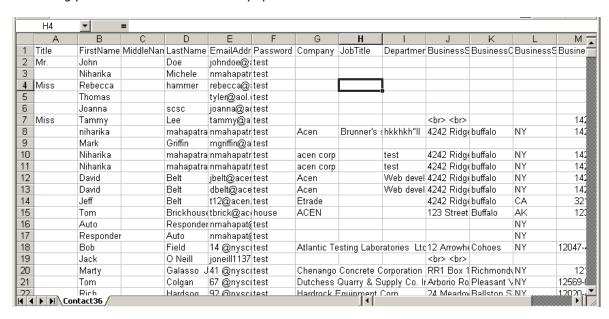
Downloading Contacts

You can download the Contact Registry database to your computer. Click on the "Download" link at left, and the Download Contact List page will be displayed:



Download Contact List page.

To download your contact list, click on the "Click here..." link. If you have Microsoft Excel installed on your computer, a file containing your contacts will be automatically opened:



From within Excel, you may save the file to any desired location on your computer.

2. Group Manager

The Group Manager enables you to create groups and categories for your contact database, according to your specific needs and requirements. You may then assign or remove contacts from your various groups.

The Group List

To view your groups, click on the Groups link (at left). Groups are listed in alphabetical order by Group Name:



Group List.

To modify an individual group, click on the desired icon in that group's row. For example, if we want to delete the Architects group (see figure above), we simply click on the "trashcan icon" if under the Delete column in that same row (see figure above). Here are more definitions:

Create A New Group allows you to, not surprisingly, create a brand-new group.

Group Name clicking on the group name displays a list of members in that group (see "View Group" below).

Light Bulb \P or \P allows you to activate/deactivate any group. The yellow bulb indicates an active group; a gray bulb indicates an inactive group. Click to toggle the group on/off.

Delete III permanently removes the selected group from the database (as in our example above). It should be noted that this only deletes the group; it does *not* delete the contacts in that group.

Editing Groups

To edit a particular group, click on the group name (from the Group List page, above). For example, clicking on "Investors" in the Group List (above) displays the "View Group" page, containing a list of contacts in that group:



Editing a group.

Group Editing Toolbar

While editing a group, a toolbar appears at the top of the page:



Group Editing Toolbar.

This performs many of the functions of the Contact List Toolbar (see related section above). The functions are defined as follows:

View Group displays a list of contacts in the group (see section above).

Modify Group allows you to edit the attributes of the group.

Assign Contacts allows you to add or remove contacts from the group.

Delete Group permanently deletes the currently displayed group.

Viewing Group Contacts

To view all the contacts in a group, click on the group name (from the Group List page, above) or click on the "View Group" link in the toolbar (above). For example, we can view the contacts in the "Investors" group:



View Group page.

To modify an individual contact, click on the desired icon in that group's row. For example, if we want to remove Ray Harmon (of Olmsted & Vaux) from the Investors group (see figure above), we simply click on the "Remove" link (under the Remove From Group column) in that same row. Here are more definitions:

Email

- The email icon 🛂 in the contact row allows you to send an e-mail message to an individual contact.
- The email link (Link here to send an email. at the bottom of the page allows you to send an e-mail message to all the contacts in the group.

Company links to the contact's company website, if one exists.

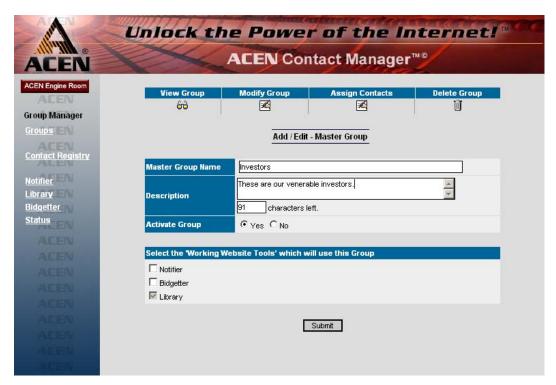
Name clicking on the contact name displays the contact's account summary (see the *Contact Registry* section):



Account Summary.

Modifying A Group

To modify the basic attributes of a group, click on the "View Group" link in the toolbar (above). The "Edit Master Group" page will be displayed:

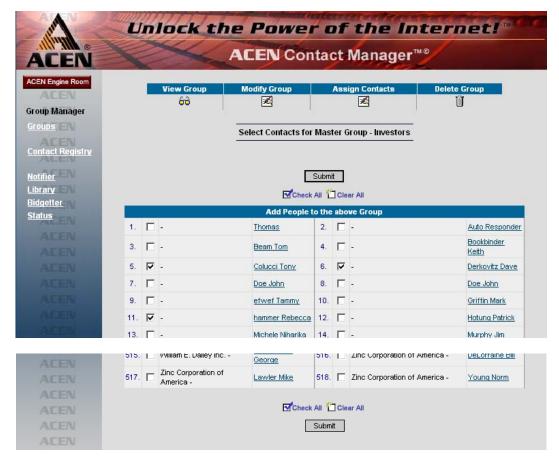


Modify Group page.

You may now edit the basic attributes of the group, including the Name, Description, and Activate Group status. Also, you can select what Working WebsiteTM Tools use this group (such as NotifierTM, LibraryTM, or BidgetterTM). Once you are finished, click the **Submit** button.

Assigning Contacts To A Group

To add or remove contacts in a group, click on the "Assign Contacts" link in the toolbar (see Group Editing Toolbar, above). This will display the "Select Contacts" page:

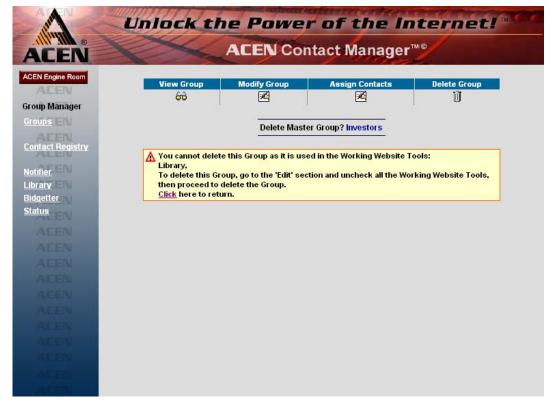


Assign Contacts page.

A list of all contacts are displayed. Check/uncheck the members you wish to add/remove. Use the **Check All** and **Clear All** buttons to check or clear all contacts. Once you are finished, click the **Submit** button.

Deleting A Group

To modify the basic attributes of a group, click on the "View Group" link in the toolbar (see Group Editing Toolbar, above). The "Edit Master Group" page will be displayed:



Deleting a group.

Note that you cannot delete a group that is currently being used by one of your Working Website™ Tools (such as Notifier™, Library™, or Bidgetter™).