Address Book

The address book is divided into 2 portions, **Personal Contacts** and **Business Contacts**. These categories are separated to allow the user to record different information for different types of contacts. For instance, you may not require the same information to be recorded for business associates as you would for personal friends. There are also 2 views in the Address Book. The basic view and the detailed view. The basic view allows you to see at a glance lists and groupings while the detailed view provides more search capabilities.

To access the **Address Book** if you are in the Tab view simply click on the **Address Book** tab, if you are in the Special view simply click on the large **Address Book** button on the left.

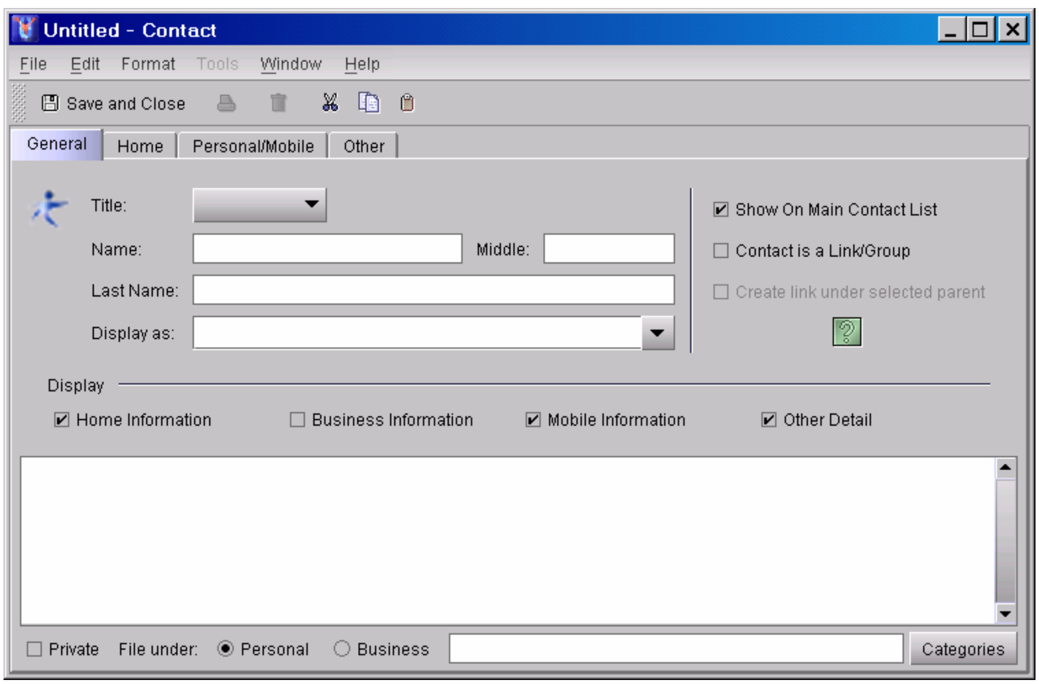
Basic View

To access the basic view click on the tab at the bottom left of the screen that says **Basic View** from the Address Book.

To Add a New Contact

To add a new contact to the database use the following steps:

1. Right click anywhere in the white area of the address book and select **New Contact** from the menu.



2. Fill out the appropriate information for the contact you are adding.

Note: If you are adding a contact to the Personal section home information, mobile information and other details are automatically checked because you are adding a personal contact. If you are adding a contact to the Business section business information, mobile information and other details are automatically checked because you are adding a business contact. These are the sections that are most likely to apply. If however, you would like make use of different sections you can change the tabs at the bottom by checking and un-checking the boxes.

Show on Main Contact List

By checking this box you will be enabling this contact to show on the main contact list that appears when you start the program. If this box is not checked you will have to **Show All Contacts** to be able to see it. For instance, if you were linking a contact to a parent contact (see To Link A Contact) you may not want them to show on the main contact list because they will already be listed under the parent, in this case you would un-check the box. In most other circumstances it is probably preferable to leave it checked.

Contact is a Link

This box should be checked if the contact you are adding is intended to be a parent contact that you would like to link other contacts to. For instance, if you would like to link members of the same family to a top link called "Smith Family", you would create a contact called "Smith Family" and leave the box checked. This box only applies to linking contacts. If you are not linking the contact, this box should be left unchecked. See To Link A Contact.

3. After entering the appropriate information you can now add the contact. You can do this by clicking on **Save and Close** or using the enter key on the keyboard.

*Note: If you have your cursor in a phone number field in the contact box and try to add the contact by using **Enter** on the keyboard it will not work. You must either use your mouse to click **OK** or move your cursor to another field and hit **Enter**.*

To Add a New Group Contact

A group contact is a contact that you can link other contacts to. For instance, if you wanted to enter the Smith Family on UVC you could create "Smith Family" as a group contact and then link all other members of the family to it.

To add a new contact to the database use the following steps:

1. Right click anywhere in the white area of the address book and select **New Group** from the menu.
2. Fill out the appropriate information for the contact you are adding

Note: If you are adding a contact to the Personal section home information, mobile information and other details are automatically checked because you are adding a personal contact. If you are adding a contact to the Business section business information, mobile information and other details are automatically checked because you are adding a business contact. These are the sections that are most likely to apply. If however, you would like make use of different sections you can change the tabs at the bottom by checking and un-checking the boxes.

Show on Main Contact List

By checking this box you will be enabling this contact to show on the main contact list that appears when you start the program. If this box is not checked you will have to **Show All Contacts** to be able to see it.

Contact is a Link

This box will automatically be checked because the contact you are adding is intended to be a group contact that you would like to link other contacts to.

3. After entering the appropriate information you can now add the contact. You can do this by clicking on **Save and Close** or using the enter key on the keyboard.

*Note: If you have your cursor in a phone number field in the contact box and try to add the contact by using **Enter** on the keyboard it will not work. You must either use your mouse to click **OK** or move your cursor to another field and hit **Enter**.*

Journal Activities

This tab on the client information card keeps track of all of the linked activities that have taken place for a particular contact. For instance, if you have entered any tasks, appointments or notes that are linked to a contact, a record of them will appear in this area. To access the journal activities for a contact use the following steps:

1. Find the contact that you would like to view the journal activities for.
2. Double click on the contact.
3. Click on the journal activities tab along the top of the screen. If you do not see a journal activities tab it is because there have been no activities linked to that contact.

To Find a Contact in the Basic View

If you have added a large number of contacts and do not wish to scroll up and down to find them, simply click anywhere in the white area of the screen and type the first letter of the contacts first name. The screen should then automatically jump to that section of the alphabet thus saving you the trouble of scrolling.

To View/Edit an Existing Contact

To view or edit an existing contact's information use the following steps:

1. Find the contact you would like to edit.
2. Double click on the contact or right click on the contact and select **Open** from the menu. You should then see the contact's information.
3. If you are editing the information, make the necessary changes and click on **Save and Close** or use the **Enter** key on the keyboard. If you have not made any changes but just wanted to view the information, simply click on the x in the top right hand corner of the screen when you are finished.

Note: If you have your cursor in a phone number field in the contact box and try to add the contact by using ***Enter*** *on the keyboard it will not work. You must either use your mouse to click* ***OK*** *or move your cursor to another field and hit* ***Enter****.*

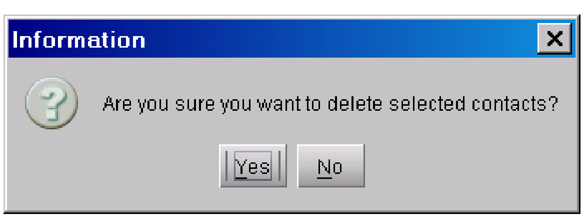
To View a Contact's Phone Numbers and Emails

To view a contact's phone numbers without having to edit the contact simply click once on the contact's name on the main screen. If no phone numbers were entered for the contact, none will be displayed.

To Delete a Contact

To delete an existing contact use the following steps:

1. Select the contact you would like to delete.
2. Right click on the contact or and select **Delete Contact** from the menu. You should then get the following warning:



3. Click **Yes** to confirm delete.

Warning: Please exercise caution when deleting contacts. The action cannot be reversed.

Showing All Contacts

To show all contacts regardless if they have "Show on main contact list" (See To Add a Contact) selected or not, use the following steps:

1. Right click anywhere in the white area of the Address Book and select **Show All Contacts** to turn the option on or off. If there is a checkmark beside **Show All Contacts** the option is enabled. If there is not a checkmark the option is disabled.

Display and Sort Name By

You are able to display how your contacts are listed in your Address Book list.

To change how your contacts are listed please use the following steps:

1. Right click anywhere in the white area of the Address Book and select **Display and Sort Name by.** You should then get another menu giving you 4 options of how you would like to display the names.
2. Select the option you want by clicking on it. Your Address Book contacts will now display in that order.

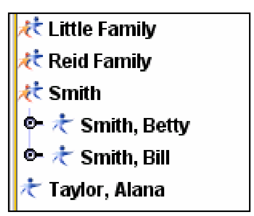
To View and Work with Contacts for Another User

If a user has given you access to their Address Book you may be able to view, add, delete and modify that users contacts based on what type of access you have. To be able to do this simply select the users name from the drop down list towards the top left of the screen where it says **My Address Book** and you will be able to see and possibly work with all of their contacts.

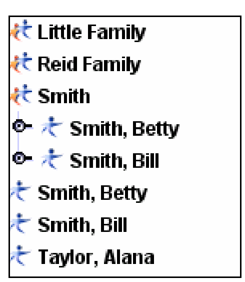
Links and Relationships

UVC gives you the ability to link contacts to other "parent" contacts. You can link a contact to a parent while you are adding it or afterwards. When linking contacts there are also 2 ways to display the linked contacts:

A. The linked contacts can be visible under their "parent" link and shown only there. With the parent visible on the main contact list.



B. The linked contacts can be visible under their "parent" link and visible on the main contact list thus showing them twice.



To Link a Contact

To Link Contacts to Parent Contacts While they are Being Added

To link contacts to a parent contact while you are adding them to the database use the following steps:

1. Create a new contact that is to be the “parent” contact. If the parent contact already exists then skip this step. Other contacts will be linked to this contact. Using the before mentioned example we would now be creating “Smith Family” (See To Add a Contact). When adding the contact ensure that **Show on Main Contact List** is checked and **Contact is a Link** is checked.
2. Once you have added the parent contact we will add the contacts that will be linked to it. To do this right click on the parent contact you have just added and select **New Contact** from the menu. When the new window appears **Create Link Under Selected Parent** will automatically be checked. This means that you are going to create a contact that will be linked to the contact you right clicked on. If you would like your contact to be visible on the main contact list as shown in option B above then place a checkmark beside **Show on Main Contact List**. If you would not like your contact to be shown on the main contact list as shown in Option A above leave this box unchecked.
3. Fill out all the appropriate information and click on **Ok**.

If you expand your parent contact in the Address Book by clicking on it once you should be able to see the contacts you have just linked to it underneath it.

To Link Contacts that have Already Been Added to the Database to Parent Contacts

To link contacts that you have already added to the database to parent contacts use the following steps:

1. Find or add the contact that is to be the parent contact and ensure that **Show on Main Contact List** is checked and **Contact is a Link** is checked.
2. Right click on the parent contact and select **Links and Relationships** from the menu.
3. In the bottom part of the window that appears you will see a list of all your address book contacts. Find the ones that you would like to like to this parent contact and place a checkmark under the **Link** column.
4. Click on **Ok**.

Note: The contact you have just linked will be visible on the main contact list as well as under the parent contact as shown in option B above. If you would not like your contact to be visible in both places you must edit your contact and remove the Show on Main Contact List checkmark.

If you expand your parent contact in the Address Book by clicking on it once you should be able to see the contacts you have just linked to it underneath it.

Un-Linking Contacts from Parent Contacts

If you have a contact that is linked to a parent contact that you would like to remove the link for use the following steps:

1. Find the parent contact that you would like to remove the linked contact from.
2. Right click on the parent contact and select **Links and Relationships** from the menu.
3. In the bottom part of the window that appears you will see a list of all your address book contacts. Find the ones that you would like to remove from being linked under this parent and remove the checkmark in the **Link** column.
4. Click on **Ok**.

Note: The contact you have just removed the link from may not be visible on the main contact list. If you cannot find your contact right click anywhere in the white area and select Show all Contacts. Find the contact you have been working with, double click to edit it and ensure that Show on Main Contact list is checked.

To Email a Single Contact

Once you have added contacts to your address book you are able to send them emails directly from UVC. To do this you must either have your email application already setup and configured or have your Internet browser configured to send emails (this is usually found in you browser's preferences). Your contact must also have an email address recorded in their information (see To Add a Contact, To View/Edit a Contact).

To send an email to a single contact's email address use the following steps:

1. Find the contact you would like to send the email to.
2. Click once on the contact, a list of available email addresses for that contact will appear.
3. Click on the email address you would like to send the email to.
4. Your Email application will now be launched and you will be able to write and send an email.

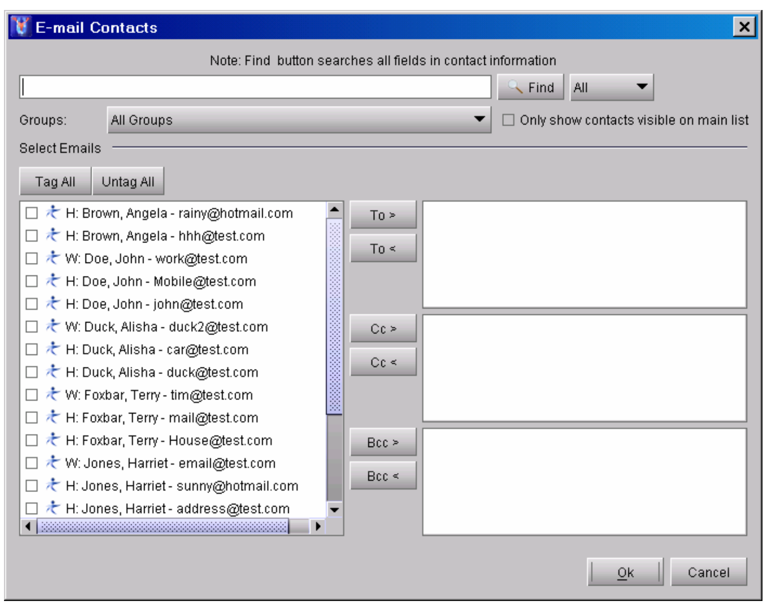
Note: If a window does not open allowing you to compose an email, your browser is not configured to send emails. To continue, configure your browser and repeat these steps.

To Email Multiple Contacts

Once you have added contacts to your address book you are able to send them emails directly from UVC. To do this you must either have your email application already setup and configured or have your Internet browser configured to send emails (this is usually found in you browser's preferences). Your contact must also have an email address recorded in their information (see To Add a Contact, To View/Edit a Contact). You are able to send emails to multiple contacts or cc contacts directly out of UVC.

To send an email to multiple contacts or cc contacts please use the following steps:

1. Right click anywhere in the white space of the Address Book.
2. Select **Write an Email** from the menu then **Open Email Window**.



3. A window will now appear that has a box on the left that lists all your contacts. You are able to move the contacts that you would like to send the email to by placing a checkmark in the box beside their name and clicking on the **To>** button in the middle to move the contacts to the box on the right. You are likewise able to take contacts off the list of people you are going to send the email to by placing a checkmark beside them and clicking on the **To<** button in the middle to move them back to the box on the left. You are able to do the same thing for contacts that you wish to cc and bcc. Simply use the **Cc>** and **Bcc>** buttons. If you have a large list of contacts and need to find a specific one you can do this by using the find feature at the top of the screen. This find field will search for any data that was entered on the contact information sheet such as name, address or phone number. You are also able to search by personal or business contacts and by groups.
4. Once you have moved the contacts to the boxes on the right that you would like to send your email to simply click on **Ok**. Your Email application will now be launched and you will be able to write and send an email.

Note: If a window does not open allowing you to compose an email, your browser is not configured to send emails. To continue, configure your browser and repeat these steps.

To Go to a Contacts Personal/Business Web Page

Once you have added contacts to your address book you are able to go to their web pages directly from UVC. To do this you must have an Internet browser installed on your computer and the contact you are trying to go to the web page for must also have a personal or business web page address recorded in their information (see To Add a Contact, To View/Edit a Contact). To go to the contact's web page use the following steps:

1. Find the contact you would like to go to the web page for.
2. Right click on the contact or and select **Visit Web Page** from the menu.
3. Another menu will pop up showing the available Web addresses. Just select the one you want.

*Note: If you cannot select **Visit Web Page** because it is disabled, your contact does not have a personal or business web page address recorded. Simply edit the contact (see To View/Edit a Contact) and add the web address to continue.*

4. Your Internet browser will now be launched and will take you directly to the contacts business web page.

Categories

You are able to sort contacts into categories to make groups of contacts. This can be useful when searching for contacts, printing information for contacts or displaying contacts because these can all be done by category. If you would like to group contacts by categories you must first setup you categories. You can do this by going to the File menu or by using the shortcut provided in the steps below. To group contacts by categories please use the following steps:

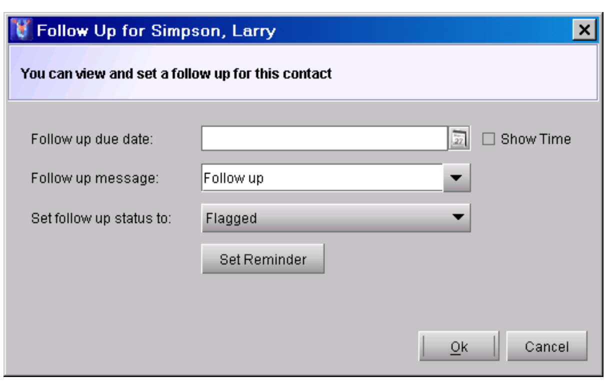
1. Find the contact you would like to go to assign a category to.
2. Right click on the contact and select **Categories** from the menu.
3. You should now see a list of available categories if you have already set them up. If you have not setup up your categories you can do it from here by clicking on **Edit Category List** and adding a new category. Place a checkmark beside the category you would like to assign the contact to.
4. Click on **Ok**. The contact will now be part of that group or category.

Follow Up

You are able to flag a contact for follow up and set a reminder if you wish. You are then able to search for all of your contacts that are in need of follow ups in the detailed view.

To flag a contact for follow up please use the following steps:

1. Find the contact you would like to set a follow up for.
2. Right click on the contact and select **Follow Up** from the menu.



3. Enter the due date you would like for the follow up.
4. Select what type of follow up it is to be from the drop down list.

5. Enter the status of the follow up from the drop down list. In most cases if you are entering the follow up the status will be **Flagged** and you will change it to completed once it is completed.
6. If you would like to set a reminder click on the **Set Reminder** button.
    a) Click on the **Date/Time Alert** button.
    b) Enter the time you would like the alert.
    c) Select where you would like the alert to go by placing a checkmark beside the appropriate option.
    d) If you have selected email or mobile phone, enter your address or phone number.
    e) Click on **Ok**.
7. Click on **Ok** to close the window.

Forward V-Card

You are able to forward information for a contact in VCard format by email directly from UVC to any contacts that you have an email address for. To do this you must either have your email application already setup and configured or have your Internet browser configured to send emails (this is usually found in you browser's preferences). You are able to forward the VCard to multiple recipients and use cc and bcc functions. To forward a contact's information in VCard format please use the following steps:

1. Find the contact you would like to forward information in VCard format for.
2. Right click on the contact or and select **Forward V-Card** from the menu.
3. A window will now appear that has a box on the left that lists all your contacts. You are able to move the contacts that you would like to send the VCard information to by placing a checkmark in the box beside their name and clicking on the **To>** button in the middle to move the contacts to the box on the right. You are likewise able to take contacts off the list of people you are going to send the VCard information to by placing a checkmark beside them and clicking on the **To<** button in the middle to move them back to the box on the left. You are able to do the same thing for contacts that you wish to cc and bcc. Simply use the **Cc>** and **Bcc>** buttons. If you have a large list of contacts and need to find a specific one you can do this by using the find feature at the top of the screen. This find field will search for any data that was entered on the contact information sheet such as name, address or phone number. You are also able to search by personal or business contacts and by groups.
4. Once you have moved the contacts to the boxes on the right that you would like to send your VCard information to simply click on **Ok**. Your Email application will now be launched and the information for the contact you selected will be attached as a VCard attachment. You will also be able to write a message on the email. Once this is done simply send the email.

Note: If a window does not open allowing you to compose an email, your browser is not configured to send emails. To continue, configure your browser and repeat these steps.

Print

You are able to print 2 reports from the Address Book basic view. The Contact List report and the Contact Details Report. To print the reports use the following steps:

1. Right click anywhere in the basic view.
2. Select **Print** from the menu.
3. The available reports will be listed on the left hand side of the screen. Select the report you wish to print.
4. Once you select your report you will have various options available on the right hand side of the screen. Select the options you would like.

<u>All Contacts</u>

This will include all of your contacts in your report.

<u>Selected Contacts</u>

This will include only the contacts that you have selected. To select contacts go to the basic view and click on the contact, to select multiple contacts use the Ctrl key.

<u>Contacts Under Selected Parent</u>

This will include contacts under a parent contact that you have selected. To select a parent contact in the basic view simply click on it.

5. Select the type of Output you would like to use from the top of the screen. You are able to choose **Screen**-shows you a print preview, **Printer**-prints to paper, **HTML File**-creates and HTML file or **Adobe PDF**-creates a PDF file.
6. Click on **Ok**.

New Task for Contact

UVC gives you the ability to link a task to one or multiple contacts. You are able to list tasks by contact in the task view as well as view Journal Entries for each contact to see what activities have taken place for each contact.

To Add a Task for a Contact

To add a new task for a contact please use the following steps:

1. Find the contact you would like to enter a task for.
2. Right click on the contact or and select **New Task for Contact** from the menu.
3. Enter the Task details (see To Add a Task).
4. Click on **Save and Close**.
5. If you double click on the contact from the Address Book and go to the **Journal Entries** tab you will be able to see the Task you have just entered.

To Add a Task for Multiple Contacts

To add a new task for multiple contacts please use the following steps:

1. Find one of the contacts you would like to enter the task for.
2. Right click on the contact or and select **New Task for Contact** from the menu.
3. Enter the Task details (see To Add a Task).
4. Near the bottom of the window there is a button that says **Contacts**. It will already have the name of the contact you started working with in it. To add the other contacts that you would like to assign the task to click on the button. A window will now appear that has a box on the left that lists all your contacts. You are able to move the contacts that you would like to assign the task to by placing a checkmark in the box beside their name and clicking on the **>** button in the middle to move the contacts to the box on the right. You are likewise able to take contacts off the list of people you are going to assign the task to by placing a checkmark beside them and clicking on the **<** button in the middle to move them back to the box on the left. If you have a large list of contacts and need to find a specific one you can do this by using the find feature at the top of the screen. This find field will search for any data that was entered on the contact information sheet such as name, address or phone number. You are also able to search by personal or business contacts and by groups.
5. Once you have moved the contacts to the boxes on the right that you would like to assign the task to simply click on **Ok**.
6. Click on **Save and Close**.
7. If you double click on any of the contacts you have just assigned the task to from the Address Book and go to the **Journal Entries** tab you will be able to see the Task you have just entered.

New Appointment for Contact

UVC gives you the ability to link an appointment to one or multiple contacts. Once you add an appointment that is linked to a contact you are able to view the appointment in the Journal Entries section for each contact to see what activities (tasks, appointments, notes) have taken place for that contact.

To Add an Appointment for a Contact

To add a new appointment for a contact please use the following steps:

1. Find the contact you would like to enter an appointment for.
2. Right click on the contact or and select **New Appointment for Contact** from the menu.
3. Enter the Appointment details (see To Add an Appointment).
4. Click on **Save and Close**.

5. If you double click on the contact from the Address Book and go to the **Journal Entries** tab you will be able to see the Appointment you have just entered.

To Add an Appointment for Multiple Contacts

To add a new appointment for multiple contacts please use the following steps:

1. Find one of the contacts you would like to enter the appointment for.
2. Right click on the contact or and select **New Appointment for Contact** from the menu.
3. Enter the Appointment details (see To Add an Appointment).
4. Near the bottom of the window there is a button that says **Contacts**. It will already have the name of the contact you started working with in it. To add the other contacts that you would like to enter the appointment for click on the button. A window will now appear that has a box on the left that lists all your contacts. You are able to move the contacts that you would like to enter the appointment for by placing a checkmark in the box beside their name and clicking on the **>** button in the middle to move the contacts to the box on the right. You are likewise able to take contacts off the list of people you are going enter the appointment for by placing a checkmark beside them and clicking on the **<** button in the middle to move them back to the box on the left. If you have a large list of contacts and need to find a specific one you can do this by using the find feature at the top of the screen. This find field will search for any data that was entered on the contact information sheet such as name, address or phone number. You are also able to search by personal or business contacts and by groups.
5. Once you have moved the contacts to the boxes on the right that you would like to enter the appointment for simply click on **Ok**.
6. Click on **Save and Close**.
7. If you double click on any of the contacts you have just entered the appointment for from the Address Book and go to the **Journal Entries** tab you will be able to see the Appointment you have just entered.

New Note for Contact

UVC gives you the ability to link a note to one or multiple contacts. You are able to list notes by contact in the note view as well as view Journal Entries for each contact to see what activities have taken place for each contact.

To Add a Note for a Contact

To add a new note for a contact please use the following steps:

1. Find the contact you would like to enter the note for.
2. Right click on the contact or and select **New Note for Contact** from the menu.
3. Enter the Note details (see To Add a Note).
4. Click on **Save and Close**.
5. If you double click on the contact from the Address Book and go to the **Journal Entries** tab you will be able to see the Note you have just entered.

To Add a Note for Multiple Contacts

To add a new note for multiple contacts please use the following steps:

1. Find one of the contacts you would like to enter the note for.
2. Right click on the contact or and select **New Note for Contact** from the menu.
3. Enter the Note details (see To Add a Note).
4. Near the bottom of the window there is a button that says **Contacts**. It will already have the name of the contact you started working with in it. To add the other contacts that you would like to assign the note to click on the button. A window will now appear that has a box on the left that lists all your contacts. You are able to move the contacts that you would like to assign the note to by placing a checkmark in the box beside their name and clicking on the **>** button in the middle to move the contacts to the box on the right. You are likewise able to take contacts off the list of people you are going to assign the note to by placing a checkmark beside them and clicking on the **<** button in the middle to move them back to the box on the left. If you have a large list of contacts and need to find a specific one you can do this by using the find feature at the top of the screen. This find field will

search for any data that was entered on the contact information sheet such as name, address or phone number. You are also able to search by personal or business contacts and by groups.

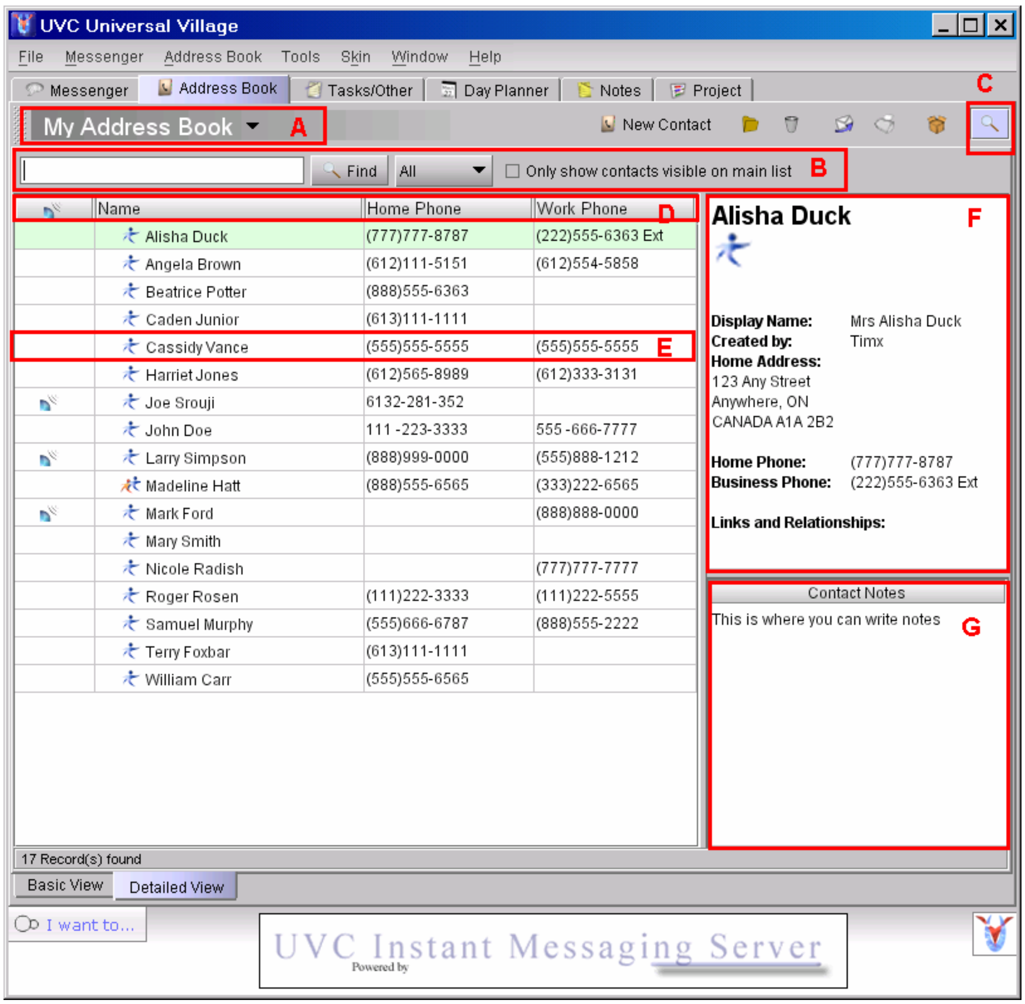
5. Once you have moved the contacts to the boxes on the right that you would like to assign the note to simply click on **Ok**.
6. Click on **Save and Close**.
7. If you double click on any of the contacts you have just assigned the note to from the Address Book and go to the **Journal Entries** tab you will be able to see the Note you have just entered.

Detailed View

To access the detailed view click on the tab at the bottom left of the screen that says **Detailed View** from the Address Book.

Screen Layout

The detailed area of the address book allows you to customize the screen that you want to work with as well as having at a glance information about your contacts. The following is an explanation of the different parts of the screen.



A

This is a drop down menu that allows you to switch between your address book and the address books of others who have given you access.

B

The find area allows you to search for contacts. This find field will search for any data that was entered on the contact information sheet such as name, address or phone number. You are also able to search by contacts that are only visible on the main contact list and by groups.

C

This button will show/hide the find area.

D

This area shows the column headers which can be customized to you preference. To customize them simply right click anywhere on a column header. To sort the column click on the header once, to reverse sort click on it twice.

E

The contacts that you have searched for will be listed in this area.

F

Any contact information will be displayed in this area

G

Any notes that you have written for a contact on the contact information card will appear in this section when the contact is selected.

Column Headings

You are able to customize your column headings in the detailed view by removing columns, adding columns and changing the order of columns. You are also able to sort ascending and descending by each column.

To Add or Remove Columns

To add or remove columns to your screen please use the following steps:

1. Right click on the column headers.
2. Place a checkmark beside columns you would like to show and remove the checkmark from columns you would not like to show.

Note: The column header with the  *symbol allows you to show a column that indicates if a follow up has been entered for a contact.*

To Move Columns

To move your columns so they are in a different order use the following steps:

1. Left click and hold on the column you would like to move.
2. Drag the column to its new location.
3. Release the mouse.

Column Sorting

To sort your columns ascending or descending use the following steps:

1. Click once on the column header you would like to sort by.
2. Click again on the same column header to sort the data in reverse order.

Group By

In the detailed view UVC allows you to group your contacts by different criteria for display and printing purposes. To group your contacts use the following steps.

1. Right click anywhere in the Detailed View area of the Address Book.
2. Select **Group By** from the menu.
3. Select which option you would like to group your contacts by:

<u>None</u>

No grouping.

<u>Categories</u>

This will separate your contacts by the customized categories that you have assigned to them. See Categories. Using this function will allow you to group your contacts any way you want.

<u>Personal/Business</u>

This will group your contacts by personal and business contacts.

<u>Company</u>

This will group your contacts by the company that you have entered in the Business information on the contact information sheet.

Your contacts will now be grouped according to what you have selected. Please note that for the grouping to be effective you must have some contacts already on the screen of the detailed area of the address book in order for them to be grouped. If you do not you will have to search for contacts and then group them.

Print

You are able to print 3 reports from the Address Book detailed view. The Contact List report, the Contact Details Report and the Contact Table List. To print the reports use the following steps:

1. Right click anywhere in the detailed view.
2. Select **Print** from the menu.
3. The available reports will be listed on the left hand side of the screen. Select the report you wish to print.
4. Once you select your report you will have various options available on the right hand side of the screen. Select the options you would like. The Contact Table List report will print a report that shows exactly as you have your screen laid out with the contacts you have searched for, the layout of the columns and the sorting of the columns. If you want to use this report it is best to layout your screen they way you would like it to show before you go into the print menu.

<u>All Contacts</u>
This will include all of your contacts in your report.

<u>Selected Contacts</u>
This will include only the contacts that you have selected. To select contacts go to the basic view and click on the contact, to select multiple contacts use the Ctrl key.

<u>Contacts Under Selected Parent</u>
This will include contacts under a parent contact that you have selected. To select a parent contact in the basic view simply click on it.

5. Select the type of Output you would like to use from the top of the screen. You are able to choose **Screen**-shows you a print preview, **Printer**-prints to paper, **HTML File**-creates and HTML file or **Adobe PDF**-creates a PDF file.
6. Click on **Ok**.