Adding New Contacts and Setting Default Screens

You can manually add new contacts to your WorkCenter by clicking on the "New Icon" located at the top left of your screen view. You will notice a new contact record screen appear. Type the information into the record and then save the changes by clicking on the "Save Changes Icon" that looks like a small computer disk.

Setting Default Screen Views for all Contact Records:

You have the ability to set the default screen view for all of your contact records listed at the left side of your WorkCenter Screen. To accomplish this, you will need to show the columns you wish to always display by clicking on the "View Visible Columns Icon". This icon looks like 5 lines stacked on top of each other and is located at the top left area of the contact screen.

Check the boxes you wish to display when the drop down menu appears. For this example, we will display the contact: FileAS and the Email1 address fields.

Click out of the drop down menu and then right click in the contact listing and select "Save View". You can also click on "View" at the top of the screen and select "Save View".

The next time you open WorkCenter, these selected views will appear.