

---

## Contacts

|   |   |
|---|---|
| Managing Contacts .....                       | 2 |
| Uploading the Contact List from Outlook ..... | 5 |
| Downloading Contacts for Outlook .....        | 6 |
| Searching and Displaying Contacts .....       | 7 |

---

## Managing Contacts

TorontoMLS provides a convenient format to maintain information about your contacts. More than just an address book, TMLS allows you to store financial information, contact requirements, and activities related to the contact.

Contacts are linked to other TorontoMLS functions in several ways:

- TMLS automatically displays each contact activity at [My Calendar](#), allowing you to manage all aspects of your schedule at one location. You must add (or change) activity information related to a contact at the contact record (see “To Update Contact Activities”, below).
- TMLS pre-fills Prospect Match and CMA records from contact information wherever it applies. If you use a contact record to create a prospect profile, TMLS adds a link to the prospect from the contact record. (See the “Requirements/Notes” heading at a Contact record to view “Prospects Stored”.)
- When you enter an email address at your Contact’s record it is automatically stored in your email address book. Edit the address and TMLS automatically updates your address book.

You can [search](#) your list of contacts using a variety of criterion. View or print search results. The contact list can be downloaded and exported for use in mailing labels and external reports (see [Searching and Displaying Contacts](#)). The .CSV (comma separated value) file format is compatible with Excel and other programs.

You can also download all of your contacts for use with Outlook or Outlook Express email programs. This does not require a search (see [Downloading Contacts for Outlook](#)). Likewise, you can upload an existing address book from Outlook or Outlook Express (see [Uploading the Contact List from Outlook](#)) in order to pre-fill your TMLS Contacts list.

## Using Contacts

### To Add a Quick New Contact

1. Select the **Contacts** tab at the top of any TMLS page.
2. Click **Add Contact**.
3. At the **General Information** page enter contact text. (First name and last name are required fields; enter an email address to be stored at the Contact record *and* the email address book.)
4. Click **Save Contact** if you have no further information to enter for the contact.

### To Add a Complete New Contact

1. Select the **Contacts** tab at the top of any TMLS page.
2. Click **Add Contact**.
3. At the **General Information** page enter contact text. (First name and last name are required fields; enter an email address to be stored at the Contact record *and* the email address book.)
4. Click **Next** to proceed to the Financial Information page, or click **Save Contact** if you have no further information to enter for the contact.
5. At the **Financial Information** page enter appropriate data. (If you enter more than one amount in a category, press Tab to refresh the total.) All fields are optional.

6. Click **Next** to proceed to the **Requirements/Notes** page, or click **Save Contact** if you have no further information to enter for that contact.
7. At the **Requirements/Notes** page enter appropriate text. All fields are optional.
8. Click **Next** to proceed to the **Activity** page, or click **Save Contact** if you have no further information to enter for that contact.
9. At the **Activity** page enter appropriate text for the first activity. If you choose to add an activity, the date and title are required. If there is more than one activity, click **Add Another Activity**. TMLS displays another set of activity input fields. Enter data, including the status (completed, to-do). Repeat as necessary for all activities. To arrange activities chronologically, click **Sort Activities by Date**.
10. Click **Save Contact**.

NOTE: Click Cancel at any Contacts page to cancel the new contact record.

### To Edit a Contact

1. Select the **Contacts** tab at the top of any TMLS page.
2. Click **Edit or Delete a Contact**.
3. At **Contact to Edit/Delete** select a contact from the drop-down list.
4. Click **Continue**. TMLS displays the contact profile.
5. To edit contact information, use the navigation buttons to view each page requiring changes. Replace existing text or add new text as necessary.
6. After making appropriate changes, click **Save Contact**.

NOTE: Click Cancel at any Contacts page to cancel changes to the contact record.

### To Delete a Contact

1. Select the **Contacts** tab at the top of any TMLS page.
2. Click **Edit or Delete a Contact**.
3. At **Contact to Edit/Delete** select a contact from the drop-down list.
4. Click **Continue**. TMLS displays the contact profile.
5. Click **Delete Contact** to remove the contact record.
6. At the confirmation prompt, click **OK**.

### To Update Contact Activities

1. Select the **Contacts** tab at the top of any TMLS page.
2. Click **Edit or Delete a Contact**.
3. At **Contact to Edit/Delete** select a contact from the drop-down list.
4. Click **Continue**. TMLS displays the contact profile.
5. Click **Activity**.
6. To add a new activity: If this is the first activity, enter text in the displayed fields. If this is an additional activity, click **Add Another Activity**. TMLS displays another set of activity input fields. Enter data, including status (completed, to-do). Date and title are required. Repeat as necessary for all new activities.

To edit an existing activity: Revise existing text or add new text as necessary.

To delete an activity: At the activity, click **Delete This Activity**.

7. Click **Save Contact**.

---

## Uploading the Contact List from Outlook

You can pre-fill TorontoMLS Contact records with information from your Outlook or Outlook Express address book. Export the address book as a text file in comma separated values format (.CSV), and then upload the file to TMLS Contacts.

NOTE: If your contact data is available in another email program, you may be able to use Outlook as a conduit for uploading the information to TMLS Contacts. Import the file into Outlook, then export the data from Outlook's email program for upload to TMLS.

If you select fields for your export file that do not exist in the TMLS Contact record, TMLS excludes those fields.

**CAUTION:** When exporting your contacts list from Outlook or Outlook Express make sure you select all fields corresponding to those in the TMLS Contacts record. For example, TMLS Contacts expects a '*first name*' field and a '*last name*' field. The list you upload must have the names in separate fields. (If you upload a list without separate fields but with a '*name*' field containing both first and last name, the list uploads; however, the first and last name fields are blank.)

### To Upload A List of Contacts

1. Select the **Contacts** tab at the top of any TMLS page.
2. Click **Upload/Download Contacts (Outlook)**.
3. At **Contact List Options**, click **Upload Contact List**.
4. Click **Browse**.
5. Locate the file containing your contact data. (It must have the file extension .CSV.) Then click **Open**.
6. Click **Continue**.
7. TMLS displays the Import Log, identifying the number of contacts uploaded and any problems encountered in the uploading process. Click **Back to Contacts**. TMLS displays the Contacts menu page.


NOTE: upon completing the upload you can perform a [Contacts Search](#) to confirm the data transfer.

---

## Downloading Contacts for Outlook

You can download all of your TorontoMLS contacts for use in Outlook or Outlook Express. The fields that Outlook expects are downloaded, in the order required.

### To Download all Contacts for Outlook

1. Select the **Contacts** tab at the top of any TMLS page.
2. Click **Upload/Download Contacts (Outlook)**.
3. At **Contact List Options**, click **Download Contact List**.
4. At the Download Contact List panel, click **Download contact list**.
5. If prompted to Open or Save, click **Save**. TMLS displays the Save As dialog box. Designate a location to save this file.
6. Rename the file, or use the default, contacts.csv.
7. Click **Save**.
8. Your system may prompt that the download is complete. If it does, click  or **Close**.

---

## Searching and Displaying Contacts

You can search Contacts for a particular person or persons. Or you can perform a search without entering search criteria to display a list of all your contacts. You can print and download the search results; and view and print individual contact records.


### Using Contact Search and Display Features

#### To Search Contacts

1. Select the **Contacts** tab at the top of any TMLS page.
2. Click **Search/Delete Contacts**.
3. Enter search text at any search field(s). (See [Entering Search Criteria](#)). To generate a list of all contacts, do not enter any search criteria.
4. Click **Submit**, to submit the search; **Clear**, to discard the search text; or **Cancel** to return to the Contacts page.
5. Click the link at the # column to view the corresponding contact record.


After reviewing the contact information, click New Search at the results page if you want to return to the Search Contacts page.

#### To Print the List of Contacts

1. At the Search Results page, click **Print View**. TMLS displays the list of contacts in a printable format in a secondary browser window.
2. TMLS reminds you that it may be necessary to print the page in landscape mode; click **OK**.
3. At the browser's menu bar, click **File**, then **Print**.
4. Set printer options as needed, then click **Print**.
5. Close  the secondary browser window to return to the Contacts Search Results List.


#### To Download the List of Contacts

CAUTION: Downloading Contact Search Results does *not* create a file suitable for importing to Outlook. (See [Downloading Contacts for Outlook](#).)

1. At the Contacts Search Results List, click **Download**.
2. If prompted to Open or Save, click **Save**.
3. Designate a location to save this file.
4. Rename the file, or use the default, DataFile.csv.
5. Click **Save**.
6. Your system may prompt that the download is complete. If it does, click  or **Close**.

#### To View and Print a Contact Record

1. At the Search Results page, click on the # for your choice of contact. TMLS displays the record for that contact. You can print this record or click **Return to Results** to return to the search results list.

2. To print the contact record, click **Print View**. TMLS displays the record in a printable format in a secondary browser window.
3. Choose **Print** from the browser's **File** menu.
4. Specify the printer options.
5. Click **Print**.
6. Close  the secondary browser window to return to the original contact record.
7. Click **Return to Results** to return to the search results list.

### **To Delete Contacts**

1. At the Search Results page, select the checkbox for each contact you want to remove from the list.
2. Click **Delete Selected**.
3. At confirmation prompt, click **OK**.
4. TMLS displays a secondary browser window to confirm that the selected contacts have been deleted.

**Tip:** You can print documents without extraneous reference information at the top (header) and the bottom (footer) of each page. (See Special Printing Format.)