

# PM MODULE MANAGING EXTERNAL CONTACTS



# MANAGING EXTERNAL CONTACTS

## DOCUMENT SUMMARY

This job guide provides step- by-step instruction for locating, creating, and modifying External Contact Records in Facilities Connect.

The purpose of this document is to serve as guided reference and/or new hire training on managing external contacts, available to all applicable users in Facilities Connect.

## VERSION INFORMATION (THIS DOCUMENT)

Version 1.1 Release Date 03/04/2022

Owner NU Facilities

Version Notes This is the original version of the document; content within represents

Most Recent

Version	Release Date	Action	Owner
1.1	03/04/2022	Updated	NU Facilities
1.0	02/13/2019	Created	NU Facilities
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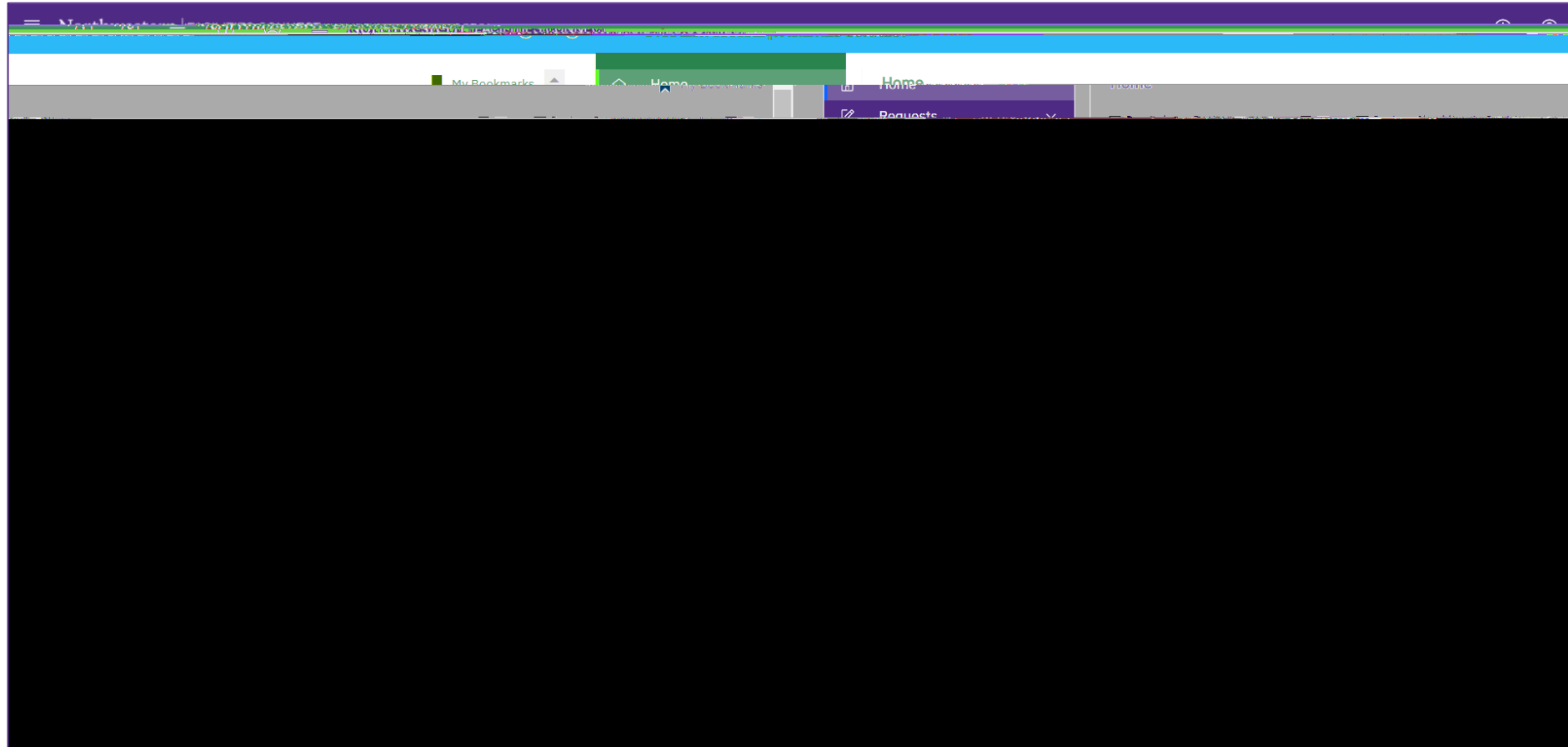


### GETTING STARTED

To begin, access the Facilities Connect Home Screen.

PROCESS

IMPORTANT

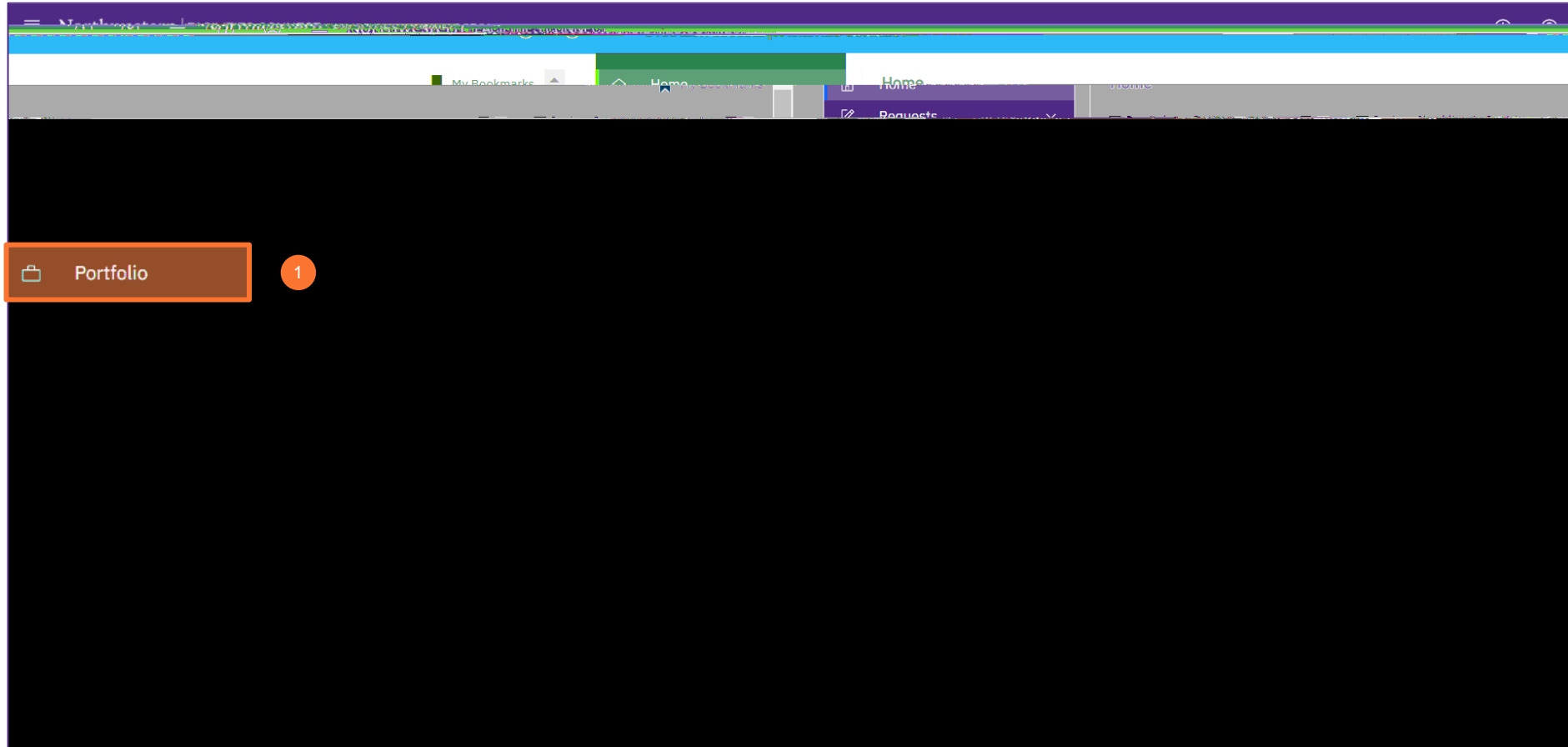




PROCESS

- 1) From the left-hand Navigation menu, click on the **Portfolio** section.

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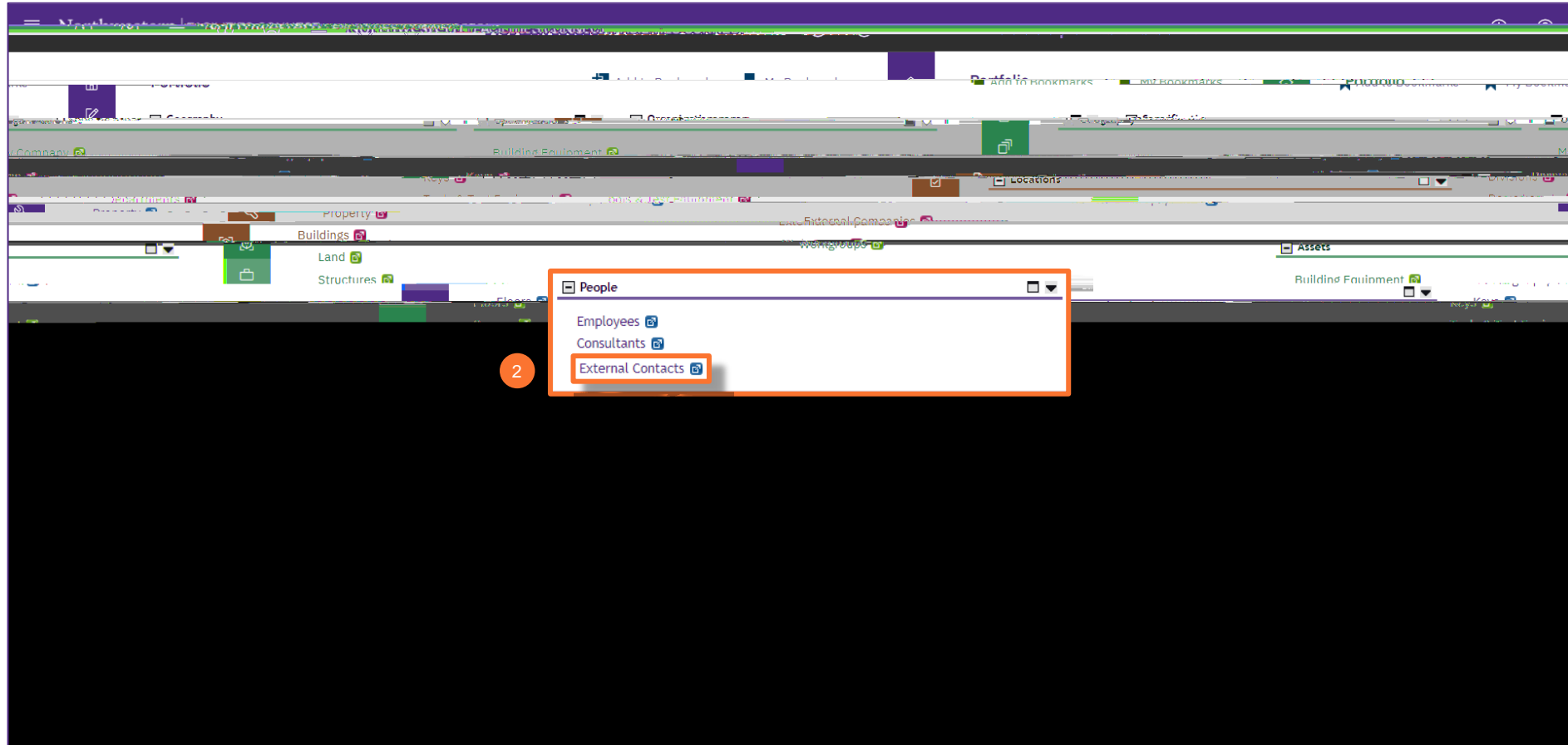


IMPORTANT

## PROCESS

- From the Portfolio screen, locate the People portlet (center of the screen), and click on the External Contacts option.

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IMPORTANT



## PROCESS

From the [External Contacts Screen](#) , you can take the following actions:

- Search existing external contacts
- Modify an existing external contact
- Add a new external contact

To Search Existing External Contacts:

- 3) Use available [Search Fields](#), by entering search criteria in one or more boxes, then press [Enter](#) to search.

The screenshot shows the 'External Contacts' screen in a web application. A red box highlights the 'External Contacts' title at the top. A red circle with the number '3' is placed over a search input field. A large black rectangular redaction covers the main content area of the page, obscuring the list of external contacts. The interface includes a navigation bar at the top with a home icon and a 'Popup View' dropdown menu. The background of the page is light gray with various colored accents.

IMPORTANT



NOW VIEWING

PROCESS

Now that the External Contact Record is open, you are able to view and modify the contact details contained within.

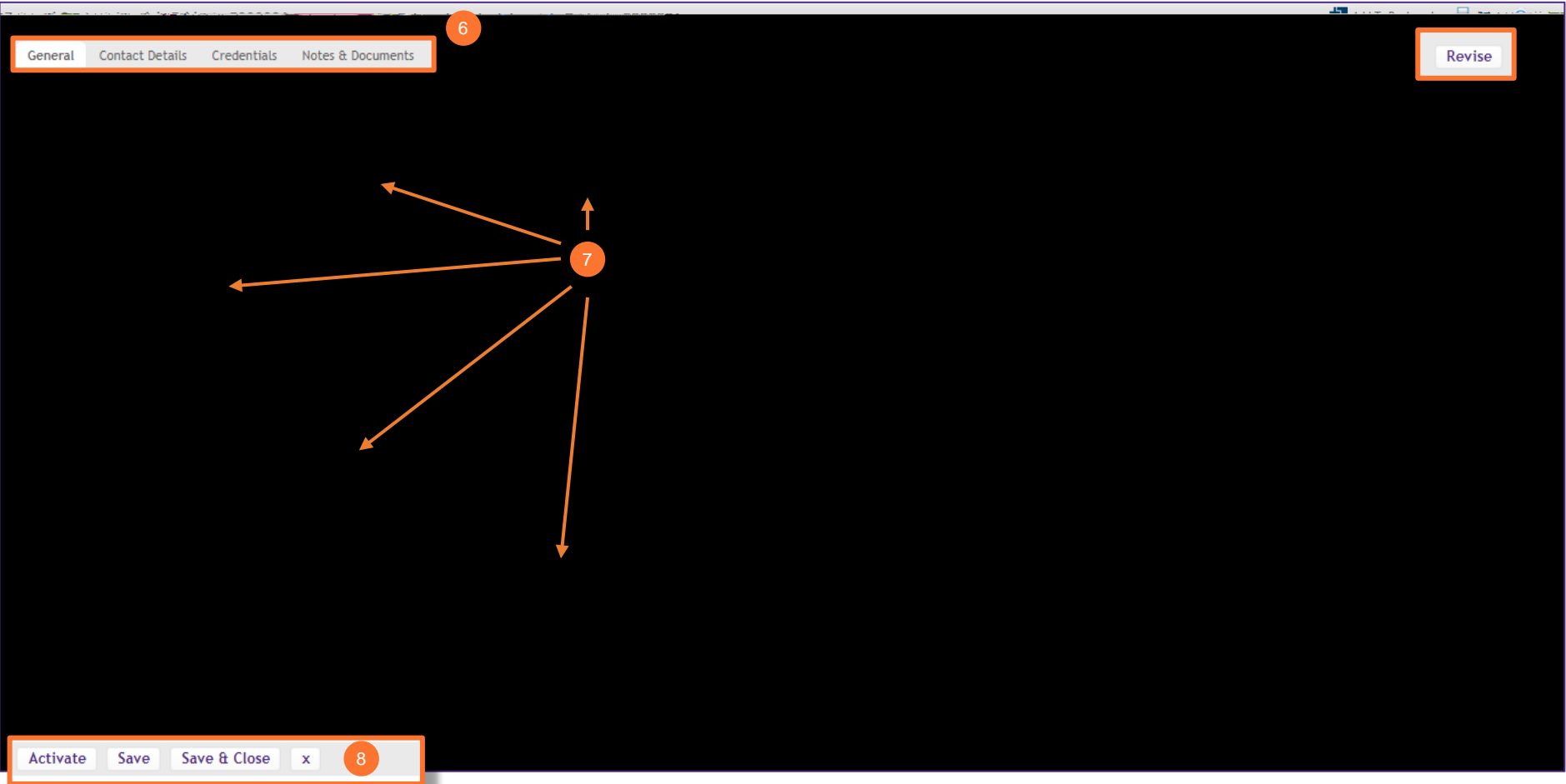
To Modify an Existing External Contact:

- 5) Click the Revise button to begin editing.
- 6) Use available Navigation Tabs to access and view all contact details contained in the External Contact Record.

- 7) Update contact information using the Content Boxes associated with available data fields.

Tip: As you update contact information, use the Save button (upper right) to save your work

- 8) When you have finished modifications to the External Contact Record, click on the Activate OR Save & Close Button to save all changes.



IMPORTANT







NOW VIEWING

To Add a New External Contact (cont.):

- 12) In the **Primary Organization** section, use the **Find** button to associate the new external contact with their organization

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**Note:** In order for an organization to appear in this list, the organization must have had at least one (1) historical purchase order (PO) with NU. If the external contact's organization is completely new and a PO has not yet been issued, the organization will not yet appear, and will need to be added to the external contact record at a later date.

The screenshot shows a web application interface for managing external contacts. The form is titled "External Contact" and is currently in the "General" tab. The "Primary Organization" section is active, showing a search field and a list of organizations. The "Contact Information" section includes fields for Work Phone, Mobile, Pager, Work Fax, Home Phone, and Email. The "Primary Address" section includes fields for Address, Zip/Postal Code, City, and State/Province. The form also has buttons for "Create Draft" and "Activate".