

THOMSON REUTERS

CHECKPOINT®



# MY CONTACTS GUIDE

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Checkpoint enables you to view a list of contacts within your organisations' Checkpoint subscription for the purpose of sharing documents and organisational alerts. You can create contact groups to save you time when sharing folders and creating organisational alerts.

1. Contact Types
2. Managing Personal Contacts
3. Managing Groups

## 1. CONTACT TYPES

There are 2 contact types in Checkpoint:

1. Organisational contacts – These are contacts that have been created by Thomson Reuters Checkpoint and cannot be edited by you. To edit these contacts, contact [TechCare.ANZ@thomsonreuters.com](mailto:TechCare.ANZ@thomsonreuters.com)
2. Personal Contacts – You can create your own personal contact records. These contacts can be either:
  - a. Private - visible only to you; or
  - b. Public - contact details shared with registered Checkpoint user within your organization.

## 2. MANAGING PERSONAL CONTACTS



### View Contacts

1. Click on the **My Contacts** tab located on the top orange tool bar
2. Under the Contacts list, on the left hand side, will be the list of contacts
3. To browse the list, use the scroll bar
4. To search the list, enter the first or last name of the contact into the search field and hit enter on your keyboard. The search results will be listed on screen
5. To view the contact details click on the **i** button beside the contact name

**Note:** You are unable to edit details of organisational contacts. To request changes contact [TechCare.ANZ@thomsonreuters.com](mailto:TechCare.ANZ@thomsonreuters.com).



### Add a Personal Contact

1. Click on the **My Contacts** tab located on the top orange tool bar
2. To add a personal contact click on the **Add Contact** button located in the bottom left hand corner of the popup window
3. In the New Contact window, enter the contact details including all mandatory fields marked with an asterisk
4. Click the Save button to save or Cancel to exit



### Edit Personal Contacts

You are able to edit the details of personal contacts you have created.

1. Click on the **My Contacts** tab located on the top orange tool bar
2. Browse or search for the personal contact you want to edit
3. Make your changes in the contact card window and click the **Update Contact Details** and/or **Update** button(s) as relevant and exit when complete



### Delete Personal Contacts

You are able to delete personal contacts you have created.

1. Browse or search for the personal contact you want to delete
2. Click on the bin icon to delete
3. Click the OK button when prompted 'Do you want to trash this contact?'. Alternatively, click Cancel to exit
4. Deleted contacts will be moved to your Deleted Contacts list



### Managing Deleted Personal Contacts

1. To view Deleted Contacts, click on the Deleted Contacts link
2. To permanently delete a contact click on **X** icon beside the contact name
3. To restore a contact, click on the **green arrow** beside the contact name
4. To view contact details click on the **i** button beside the contact name
5. To return to the My Contacts screen, click on the Back to Contacts button

## 3. MANAGING GROUPS

Groups allow you to group contacts together and name that group accordingly. This can save you time when sharing folders allowing to you to select a group instead of selecting individual names. **Note:** Only Organisational contacts are able to view and contribute to shared folders.



### Add a Group

1. Click on the **My Contacts** tab located on the top orange tool bar
2. On the right hand side of the popup window will be the list of current groups
3. To add a Group, click on the **Add Group** button located at the bottom of the window
4. A new popup window will appear
5. Enter a Group name in Create Group
6. To add a group member click on name of the contact from the list on the left hand side
7. The contact will be added to the Group Members section
8. Select the Group type – Public or Private
9. Click on the **Save Group** button to save this group



### View Groups

1. Click on the **My Contacts** tab located on the top orange tool bar
2. Under the Groups list on the right hand side will be the list of groups
3. To search or browse the list, enter the group name into the search field and hit enter on your keyboard
4. Click on the **i** button to view details of this group. Click OK to exit



### Edit Groups

1. Click on the **My Contacts** tab located on the top orange tool bar
2. Locate the group you wish to edit
3. Click on the pencil icon to edit the name or contacts of the group
4. Make your changes within Edit Group
5. Click **Back to Groups** button to exit



### Delete Groups

1. Click on the **My Contacts** tab located on the top orange tool bar
2. Browse or search for the group you want to delete
3. Click on the X icon to delete
4. Click **OK** button when prompted 'Do you want to delete this group?'. Alternatively, click Cancel to exit
5. The Group will be permanently deleted