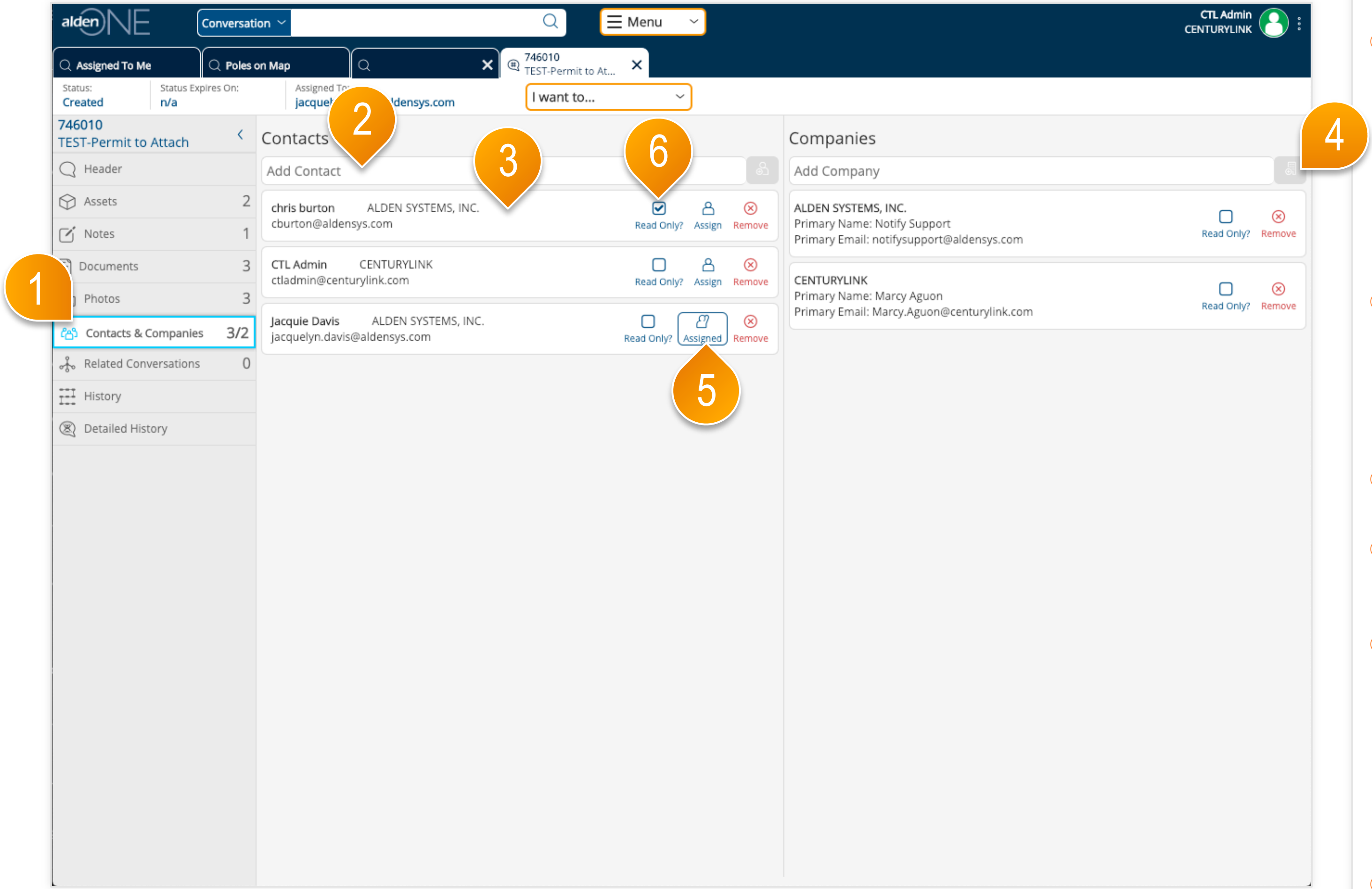
Conversation – Contacts & Companies Section



page walkthrough

① Click the Contacts & Companies tab to quickly move to the conversation contacts & companies section. The count of contacts and companies is shown in the tab. The first number indicates the number of contacts and the second number, after the slash, indicates the number of companies. Users listed as a contact have access to this conversation. All users belonging to the companies listed have access to this conversation.

② To add a new contact, type a user's name or email address in the Add Contact field, then click the button to the right of the field to add that user as a contact. Similarly, to add a new company, type the company name, then click the button to the right of the field to add that company.

③ Each contact shows the user's name, email address, and company name.

④ Each company shows the company name along with the main person to contact for that company and their email address.

⑤ The contact to whom the conversation is assigned is indicated by the user icon with the raised hand and the outline of blue. You can remove some users from the list of contacts, but you cannot remove the user who created the conversation, nor the user to whom the conversation is currently assigned. Click the assign button beside a user to assign the conversation to that user.

⑥ To grant read-only access to a user or company, click "Read-only" next to the user or company. That user or company will still be able to add notes, documents, and photos, view all information on the conversation, but will not be able to edit any header information, change the status of the conversation, or reassign it.