Copying a 25Live Contact



Security Note:

In order to use this feature, your 25Live user must have appropriate permissions (Admin: 12.0 *Create, Edit and Copy Contacts*). See Permissions in Series25 Group Administration.

Accessed via the **More Options** display when <u>Viewing Contact Details</u>, 25Live provides users with sufficient permission the ability to use the current contact they are viewing as a base to create a new contact.

How to Copy a Contact to Create a New Contact

1. Go to a Contact's Details View

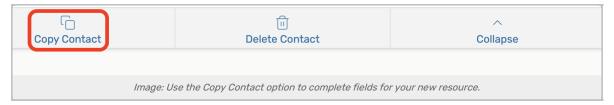
Find the contact you would like to use as a base or template for your new contact, and go to vits details view. You can do this by using favorited links from your home dashboard, searches, or when viewing calendars or availability grids.

2. Open the More Options Display



Use the More Actions link to open the display in the contact's details view.

3. Use the Copy Contact Link, And Complete Fields



Open the Copy Contact options view, then complete the information needed for your new contact.

- Name Prefix
- First Name
- Middle Name
- Last Name
- Name Suffix
- Title
- Internal ID
- Work Email
- Home Email



Security Note: You Will Still Need to Add Contact to Group

Copying a contact in 25Live does not copy the security group for the new contact. The new contact will still need to have a group assigned in the Series25 Group Administration tool.

4. Save Your New Contact

Use the **Copy and Edit** button to save your new contact's information and view its details in **Edit Mode** to add more details.



Tip: You May Also Choose to Create Another

You may also use the **Copy and Create Another** button to create an additional contact copy using the same settings and information you just completed.