REALM™

Tips & Tricks

How to Edit a Client Profile on your Mobile Device

You can edit contact information for a client in REALM on a mobile device using the following steps:

1. Select **Contacts** 📇 from the menu bar.

2. Select the **layer menu** ⬚ and choose the contact type – active, inactive, or disabled – by activating the appropriate bullet. Select the X (or swipe down) to close the layer.

3. Select the client whose information you would like to update.

4. Select the **menu icon** ⬚.

5. Select **Edit** from the drop-down menu.

6. An edit client window will appear, update the details.

7. Select **Save**.
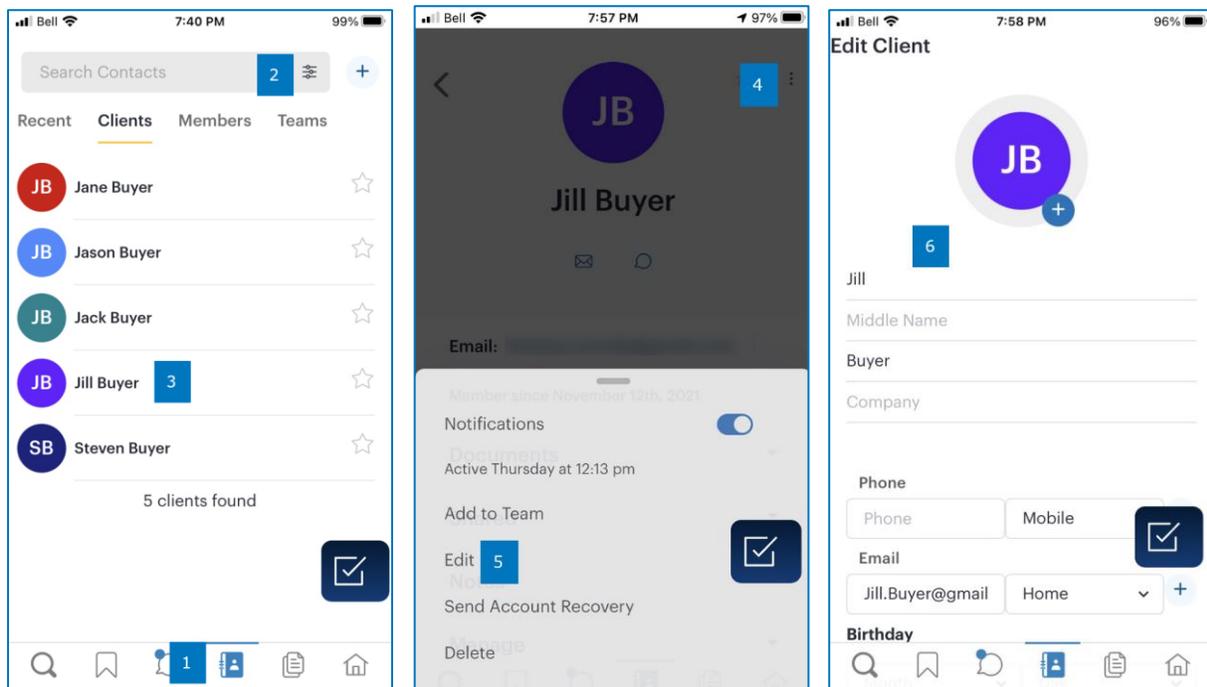
If you have any questions, please contact us at Help@REALMmlp.ca.