## **REALM**

## **Tips & Tricks**

## How to Edit a Client Profile on your PC

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

2. Select the **layer menu** <sup>\*</sup> and choose the contact status type - active, inactive, or disabled - by activating the appropriate bullet. Click away from the drop-down menu.

- 3. Select the client whose information you would like to update.
- 4. Select the **menu icon** :.
- 5. Select **Edit** from the drop-down menu.

REALM Search	Contacts	Search	1 Contacting of	Documents D	• ====================================	= 📀
Boccent Clients Membr 3 (1) Jane Buyer (1) Jack Buyer (1) All Buyer	Status Active Active Disabled Type Cient Documents Shared Notes Manage		Notifications Not Active Add to Team Edit	•	4	
Steven Boyer     Seler     Doyer & Se     4 clients     Constant     Constant	Seller     Buyer & Seller     Buyer & Seller     Buyer & Seller     Buyer & Seller     Buncter     Bandord     Landord     Contact     dfad     Friday at 9.32 AM	-	Deliete Block Contact Member since No		12 Show me how	
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## <u>RE∕</u>LM<sup>™</sup>

6. An edit client window will appear, update the details. **Note**: First Name, Last Name and Email fields are mandatory. All other fields are optional.

7. Select **Save**.

	Jack						
	Middle Name Buyer						
Company							
Phone							
Phone			Mobile	ř		+	
Email							
Scape@test.c	om			Home	~	+	
Related Contac	t					+	
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If you have any questions, please contact us at <u>Help@REALMmlp.ca</u>.

