Contacts — Learning Path

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Learning Paths › Contacts

This learning path is for users who maintain contact information in the Contacts app. You'll learn how to find contacts, review and update individual contact records, create or maintain records where your access allows, and perform routine quality checks so contact information remains usable for your organization.

Learning objectives

- By the end of this path you can locate and open a contact from the Contacts workspace.
- By the end of this path you can review the information shown on an individual contact record.
- By the end of this path you can update a contact record using the available record-editing experience.
- By the end of this path you can use the contact list and record view together to resolve day-to-day contact-information requests.
- By the end of this path you can perform a periodic review of contact records and identify records that need attention.

Prerequisites

- Access to the Contacts app and the contacts screen.
- Permission to view contact records.
- Permission to edit contact records if you will be making changes in Contacts.
- Familiarity with your organization's rules for accurate contact information and who is authorized to change it.

Module 1: Find and understand contact records

Goal: Build confidence navigating from the contact workspace to the details of an individual contact.

Lesson 1.1: Locate a contact you need to help

When someone asks for help with a contact, first locate the correct record rather than relying on memory or another source. Start in contacts, review the contacts available to you, and use the screen's available ways to identify the person or organization you need. Open the matching contact to continue work in Contacts.

Practice task: In contacts, locate a contact you recognize and open its Contacts.

Lesson 1.2: Review a contact before taking action

Before changing anything, confirm that you are looking at the intended contact and understand the information currently recorded. In Contacts, review the record information available on the screen. If the record is not the one you intended, return to contacts and select the correct contact.

Practice task: Open a contact record and identify whether it is the record you intended to review before making any edits.

Module 2: Handle day-to-day contact maintenance

Goal: Resolve routine requests to correct or maintain contact information.

Lesson 2.1: Update an existing contact record

A colleague may report that a contact's information has changed or needs correction. Locate the contact in contacts, then open Contacts. Review the current information, make the authorized changes using the editing options available to you, and confirm the record reflects the requested update.

Practice task: Using an appropriate practice record, open Contacts and make one authorized update available in your environment.

Lesson 2.2: Create or maintain a contact using the record experience

When your organization needs a contact added or maintained, begin from contacts and use the available record action for your role. Complete the work in Contacts, reviewing the information for accuracy before finishing. Return to the contact list to confirm that you can locate the contact afterward.

Practice task: If your permissions allow, create or maintain a practice contact through contacts and verify it can be found from the list.

Module 3: Keep contact information reliable over time

Goal: Use a repeatable review process to identify and resolve contact-record issues.

Lesson 3.1: Perform a contact-quality review

Periodic review helps prevent outdated or incomplete contact information from disrupting business work. Begin in contacts and select contacts for review according to your team's process. For each one, open Contacts, assess the information shown, and update it only when you have an authorized and reliable source.

Practice task: Review three available contacts from contacts and note which records, if any, require authorized follow-up.

Lesson 3.2: Resolve a reported contact-information issue

When a user reports that contact information is wrong, treat the request as a verification task. Use contacts to find the reported contact, then compare the reported issue with the information in Contacts. Correct the record if you are authorized and have verified information; otherwise, follow your organization's process for obtaining the needed confirmation.

Practice task: Choose a sample issue, locate the related contact, and explain whether you would update the record or seek confirmation first.

Final assessment

1. A coworker asks you to verify a contact's details but provides only enough information to identify the person. What screen should you start with, and what should you do before opening a record?
2. You open a contact record and realize it is not the person mentioned in the request. What should you do next?
3. A verified request requires a change to an existing contact's information. Describe the screen sequence you would use to complete the update.
4. During a routine review, you see information in a contact record that appears questionable but you do not have a reliable source to correct it. What is the appropriate action?

5. After maintaining a contact, how can you confirm that the contact remains available for day-to-day use in the app?

Answers

1. Start in contacts and identify the intended contact using the information available there before opening the record.
   Why: The contact list is the starting point for locating the correct record.

2. Return to contacts and locate the correct contact before continuing.
   Why: Changes should only be made after confirming the record belongs to the intended contact.

3. Find the contact in contacts, open Contacts, review the current information, make the authorized update, and confirm it.
   Why: The list locates the contact, while the record screen is used to review and maintain it.

4. Do not make an unverified change; seek confirmation through your organization’s approved process.
   Why: Reliable contact data requires authorized, verified updates.

5. Return to contacts and locate the contact after completing the maintenance.
   Why: Finding the contact in the list confirms it is available from the main Contacts workspace.