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New Contact Management

Complete. Not Complex.

Getting Started Guide

Welcome to the new Contact Management. The login process has changed from classic Contact Management to the new. This guide will walk you through those changes and help you begin using the new Contact Management.

All of the following steps in the Getting Started Guide should be completed to finalize the transition to new Contact Management:

- What web browsers to use.
- Accessing new Contact Management.
- Logging in for the first time.
- Changing your password.
- Setting security questions.
- Completing the required interactive “Learn It Now!” training modules.
- Check My Settings on my device
- Updating your user profile.
- Viewing your new Contact Management email address.
- Setting up your signature block.
- Accessing the Interactive Training Tutorials.

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Web Browsers and Accessing the New Website

New Contact Management is designed to work with any modern, HTML 5 compatible web browser. This includes Google Chrome, Firefox, Safari, and Internet Explorer 10 or greater.

1. Make sure your computer or device has a compatible web browser. If you have a compatible browser already, skip to step 2.

   a. If the device you will be accessing new Contact Management from does not have a compatible browser, type in one of these URLs to download one:

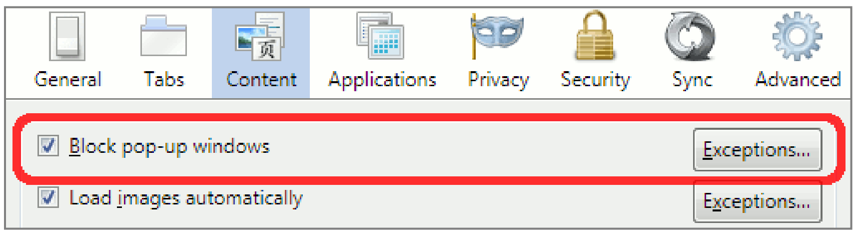
      i. Google Chrome: https://www.google.com/intl/en/chrome/browser/?brand=CHMO.
      ii. Firefox: http://www.mozilla.org/en-US/firefox/all/.
      iii. Safari: http://support.apple.com/downloads/#safari.
      iv. Internet Explorer: http://windows.microsoft.com/en-us/internet-explorer/download-ie.

   b. Complete the following instructions that match your browser to allow pop-ups and experience new Contact Management as it was designed.

      i. Google Chrome users:
         1. Click the Menu icon on the top right corner of the browser toolbar.
         2. Select “Settings.”
         3. Click the “Show advanced settings…” link at the bottom of the screen.
         4. In the “Privacy” section, click the “Content settings…” button.
         5. Scroll down to the “Pop-ups” section and click “Manage exceptions…”
         6. Select the text box and type **[*.]dealer.reyrey.net** and click “Done.”

ii. Firefox users:

1. At the top of the Firefox window, click the Menu icon and then select the Options Menu Options
2. Select the “Content” panel option.



3. Uncheck “Block pop-up windows” to disable the pop-up blocker altogether.
4. Click “Exceptions…” to enable pop-ups for the new Contact Management site only.
5. In the “Address of web site:” textbox, type **dealer.reyrey.net**.
6. Click “Allow.”

iii. Safari users:

1. Skip to step 2.

iv. Internet Explorer 9 or greater users:

1. Click the “Tools” option from those displayed along the top left corner of the screen.
2. Point to “Pop-up Blocker” in the drop-down menu.
3. Click “Pop-up Blocker Settings.”
4. In the “Address of website to allow:” textbox, type **dealer.reyrey.net**.
5. Click “Add.”
6. Click “Close.”

c. If the device you will be accessing new Contact Management from does not have Adobe Acrobat, type in the URL below to download it:

i. http://get.adobe.com/reader/

d. Complete the following instructions that match your browser to allow Adobe Reader to be your browser's default PDF viewer.
   i. Google Chrome users:
      1. In the Chrome address bar, type chrome://plugins
      2. Disable Chrome PDF Viewer.
      3. Enable the Adobe Acrobat/ Adobe Reader plugin.

   ii. Firefox users:
      1. At the top of the Firefox window, click on the Firefox button and then select Options
      2. Select the Applications panel.
      3. Find Portable Document Format (PDF) in the list and click on it to select it.
      4. Click on the drop-down arrow in the Action column for the above entry and select the PDF viewer you wish to use.

2. Double-click the compatible web browser icon on your device.

3. Type **https://dealer.reyrey.net** in the browser's address bar, and press "Enter" to access the new Contact Management website.

4. Please contact your IT professional if you require assistance with any of the above instructions.

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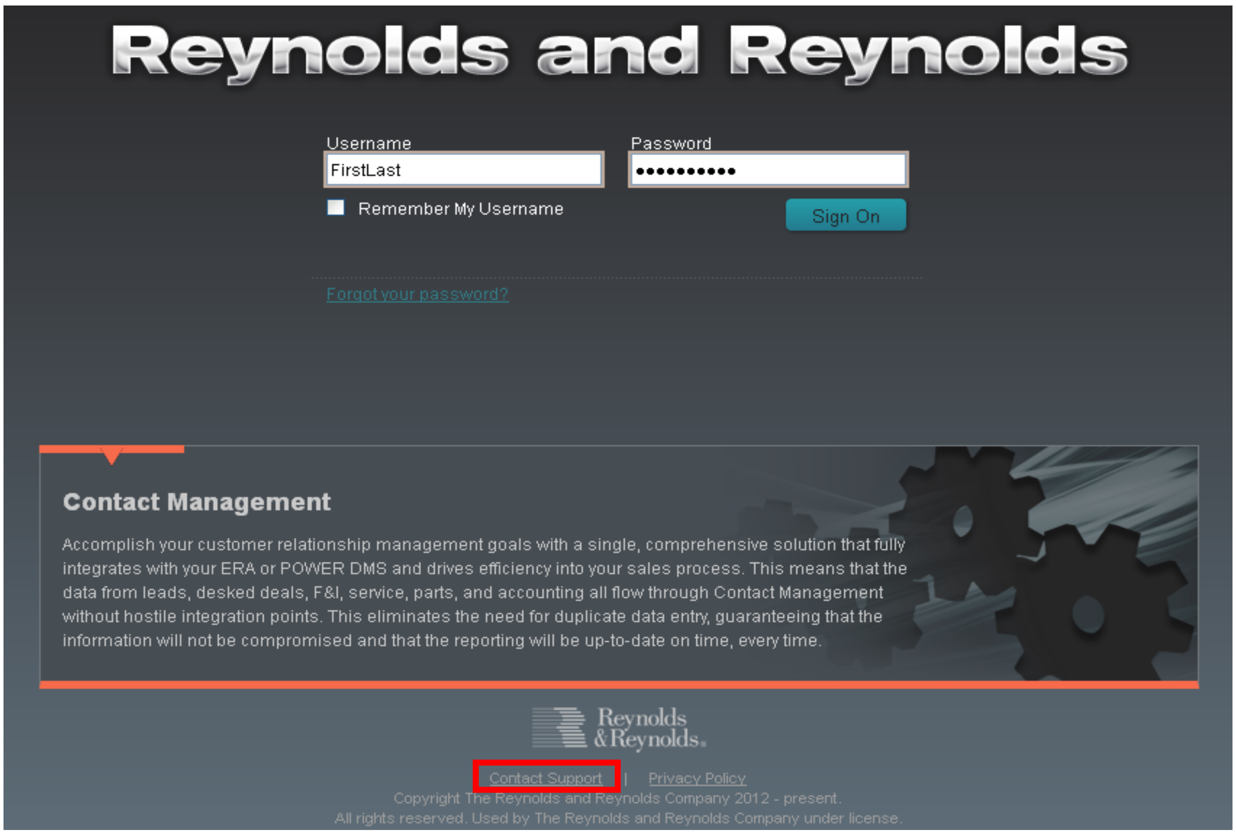
Logging into New Contact Management

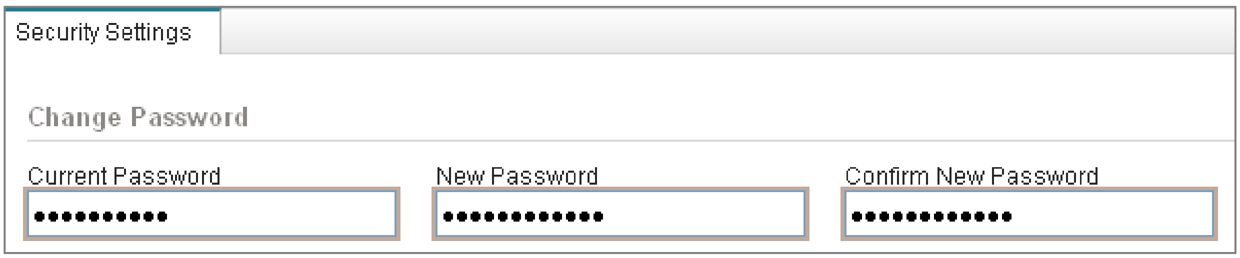
1. Type in the new username and password you received, and click the blue “Sign On” button.
   *Note: The password **is** case sensitive.*



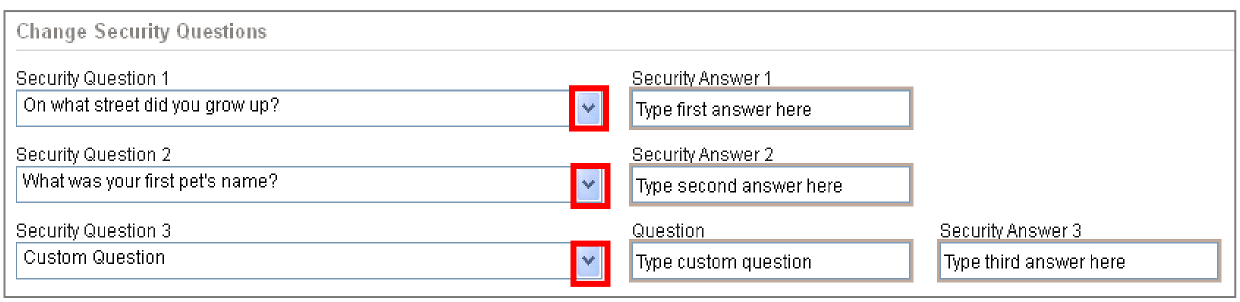
Tip: The Contact Support link at the bottom of the screen can be clicked to display our support contact information if you experience difficulties logging in.

2. Once logged in, you will see the Security Settings screen. This screen will only need to be completed the first time a user logs in.

3. Type the same temporary password used on the login screen in the “Current Password” field. Select a new password that is at least 7 characters long and contains 2 of the following 3 character types: letters, numbers, and symbols. Type the new password into the 2 corresponding fields.



4. Select one security question from each of the three drop down menus, and type each answer in the corresponding “Security Answer” textbox. These questions will be used to recover your password if you select the “Forgot your password?” link on the login screen.



Note: If you select the “Custom Question” option, a new text field will appear for you to type in the question.

5. Once you have completed the screen, click the blue “Save” button 

to proceed.

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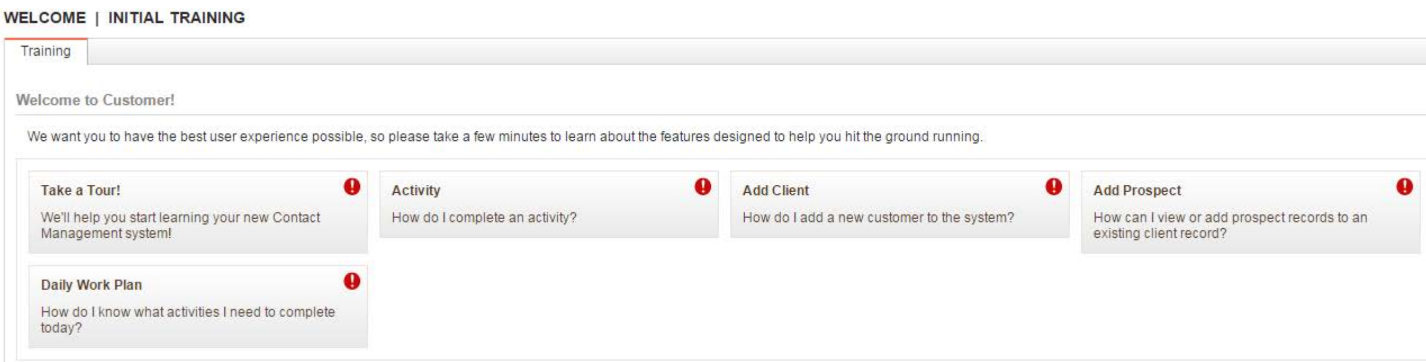
Completing the required interactive “Learn It Now!” training modules

1. You will be required to complete 5 “Learn It Now” training modules when before you can proceed to accessing Contact Management.
2. Click on the module to complete the training.



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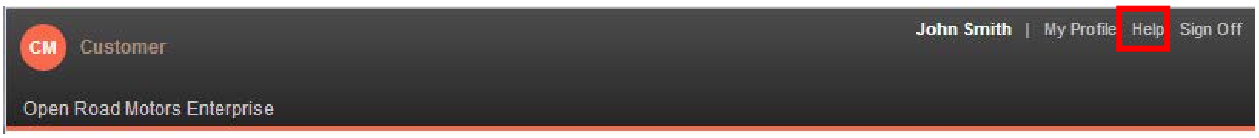
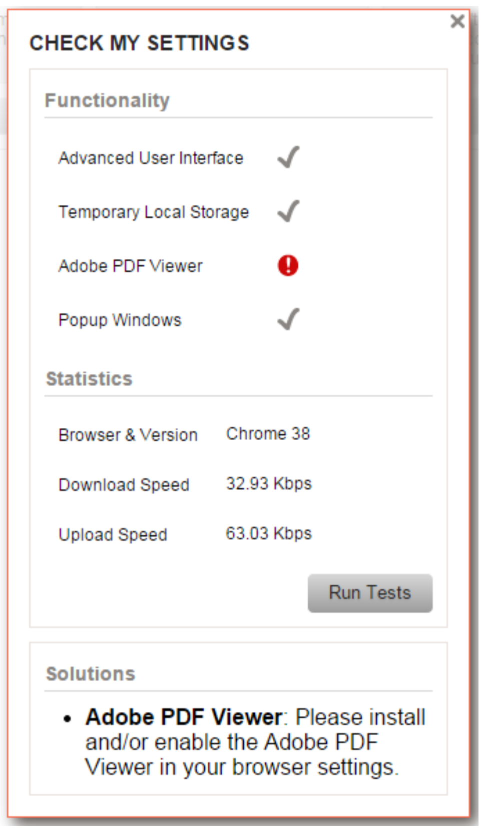
Check My Settings

1. You can access the “Check My Settings” feature by clicking the “Help” link at the top right of the screen to access the Help menu options. This will ensure that your device is optimized for Contact Management.



2. Click the “Check My Settings” box. System tests will automatically be run and results related to those tests will be displayed for you.



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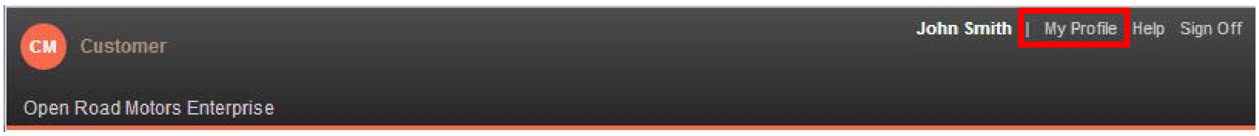
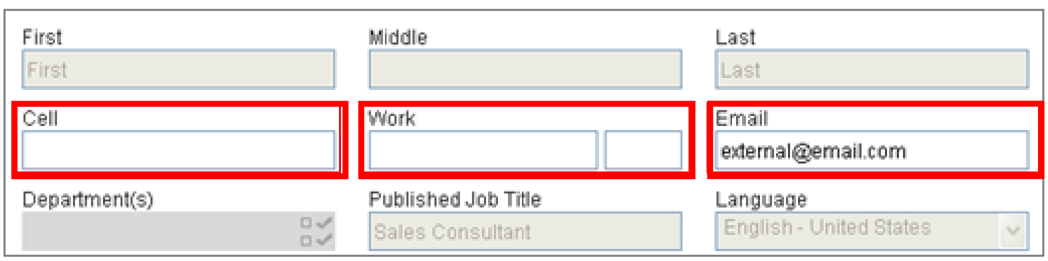
Updating Your User Profile and Setting Your Signature Block

1. Click the “My Profile” link in the top right corner of the screen to open the My Profile window, which contains the specific user’s profile information.



2. The Profile Information tab will appear, displaying the user’s current entered information. Cell and work phone numbers can be added here as well as an external email address. An external email address should be entered since that is used if you forget your password.



3. Complete the desired fields and click the “Save” button Save to proceed.

4. Click the “Shared Settings” tab.

5. Click the gray accordion labeled “Basic” to expand the section and view the user’s new Contact Management email address, displayed below the “CM Email Name” field.

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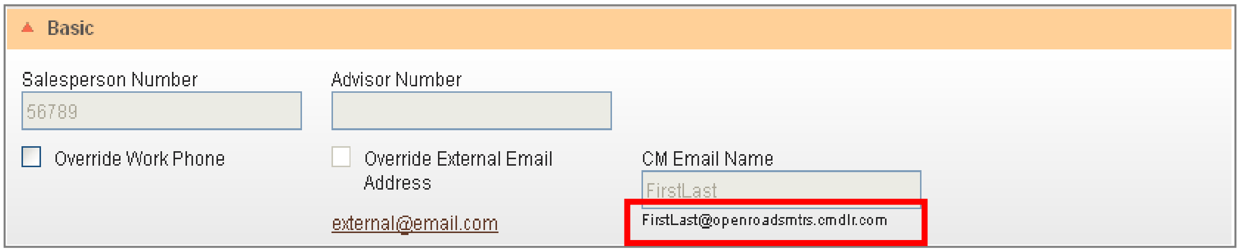
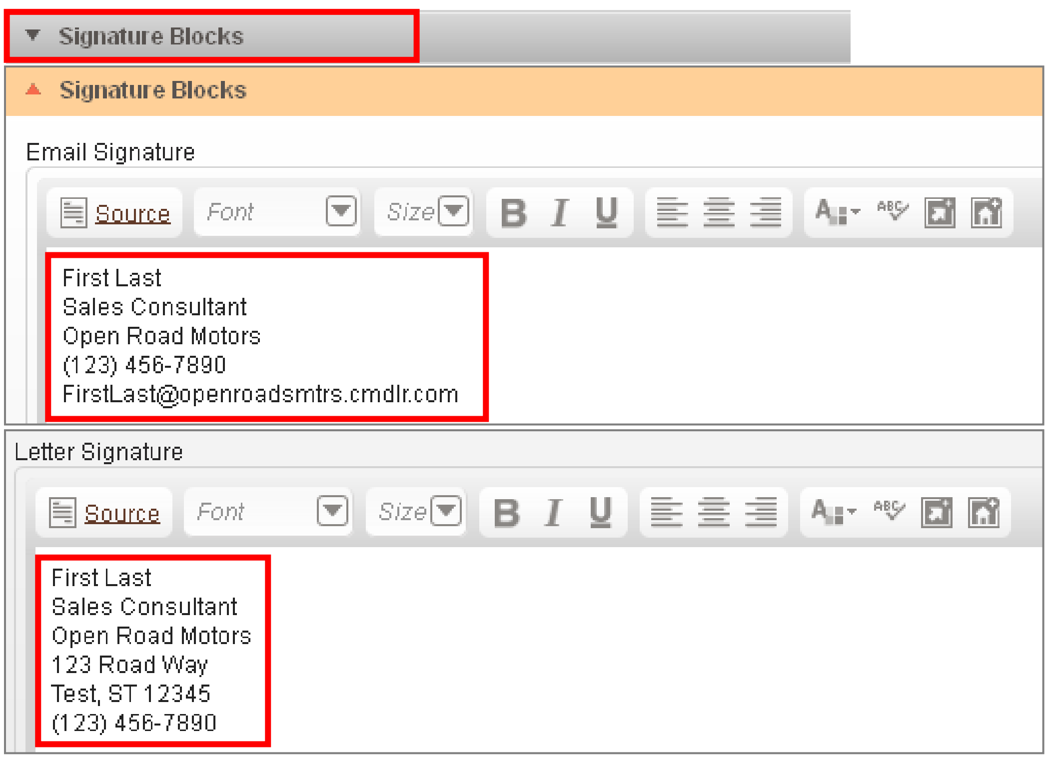
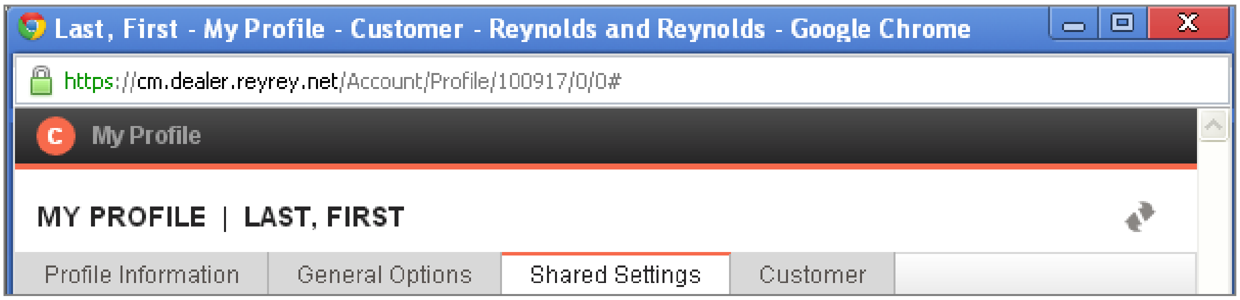


Note: You may want to use your new Contact Management email address when creating your signature blocks.

6. Click the gray accordion labeled "Signature Blocks" to expand the section. Enter an email and letter signature in the appropriate textboxes. These signatures display on emails and letters generated by the user.

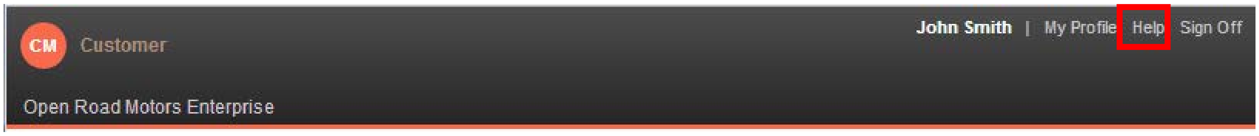


7. Once your signatures are complete click the "Save" button Save at the bottom right of the screen.
8. Click the red "X" on the top right corner of the My Profile window to close the window and proceed.



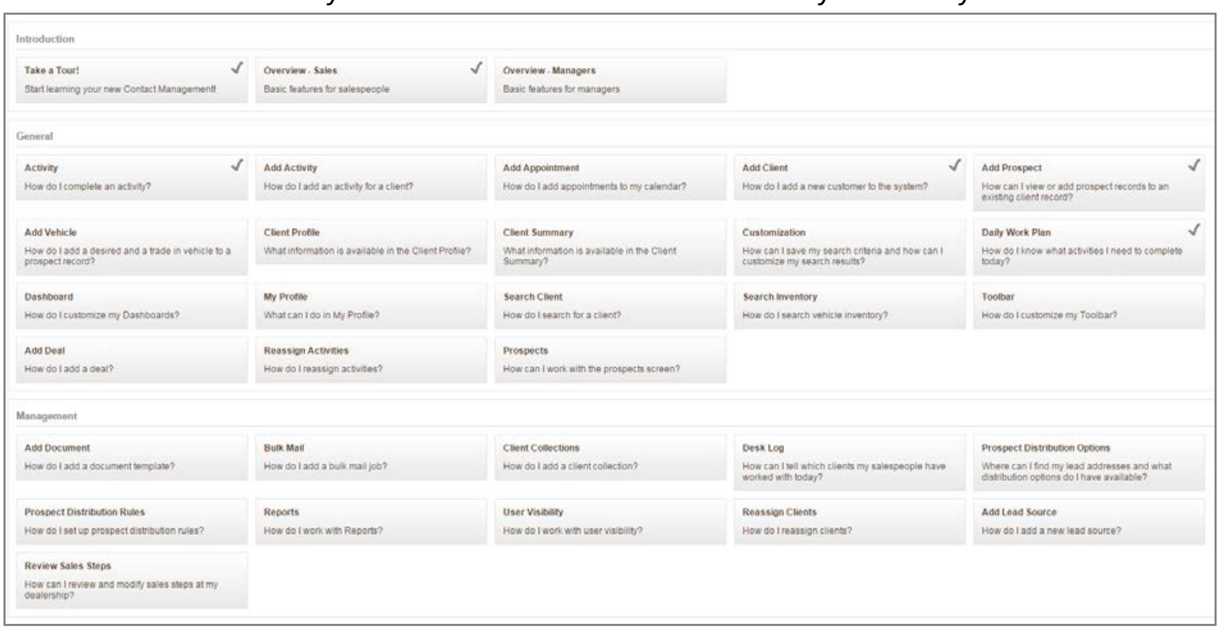
Accessing the Interactive Training Tutorials

3. You can access additional “Learn it Now” modules by clicking the “Help” link at the top right of the screen to access the Help menu options.



4. Click the “Learn It Now!” box.

5. Select each Learn It from the menu of options for a 5-15 minute interactive tutorial on specific subjects. The Learn It tutorials are always available and can be taken as many times as you like.



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