

Import an Apple Contact into the App

Summary

Describes how to import Apple contacts into the TransactionDesk app and add them to transaction contacts, address book, or Authentisign signings.

Context

You can import your Apple contacts from your mobile device into the TransactionDesk app. Once in the app, the contacts are added directly to your transactions and Authentisign signings, or stored in your address book for future use.

The purpose of this functionality is to increase your productivity by only having your contacts entered a single time in your Apple contacts, rather than having to enter and re-enter the same contact information repeatedly.


Before You Begin

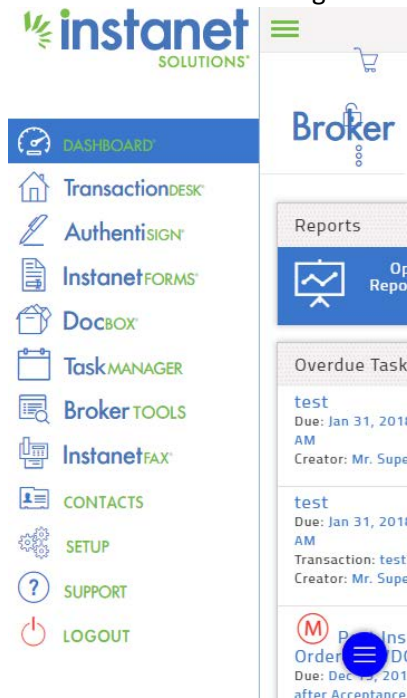
Required: Mobile device with TransactionDesk app installed, Wi-Fi connection or data plan

Recommended: Available Apple contact

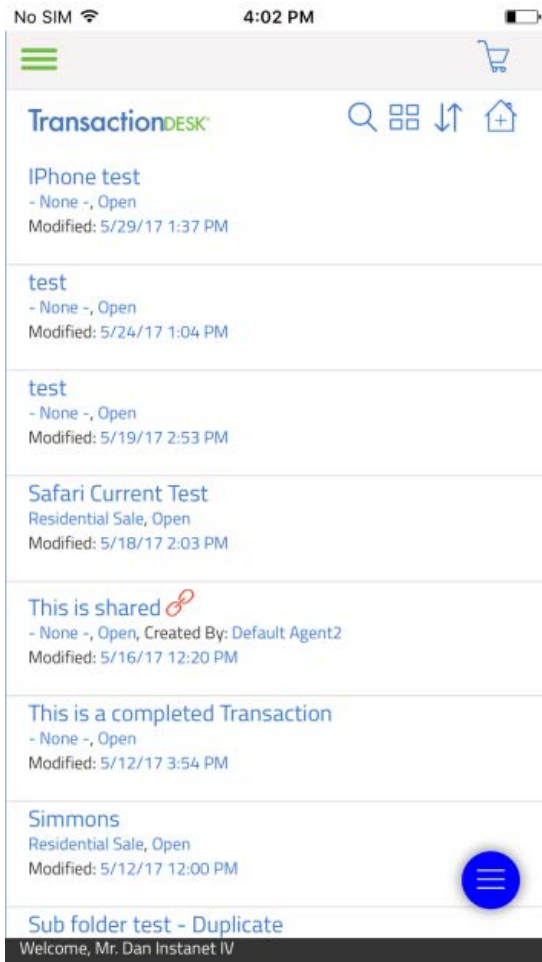
Steps

Import an Apple Contact into Your Transaction Contacts

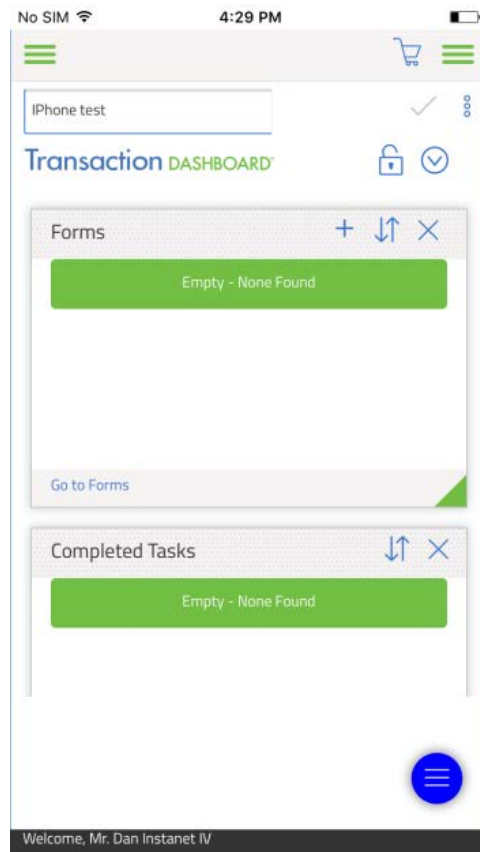
1. On the dashboard of the app, tap the hamburger menu  in the top left corner. The TransactionDesk navigation menu expands.




2. Tap **TRANSACTIONDESK**. The TransactionDesk page opens.






3. Do one of the following:
 - Tap the name of a transaction in the list of transactions.
The transaction dashboard for the selected transaction opens.

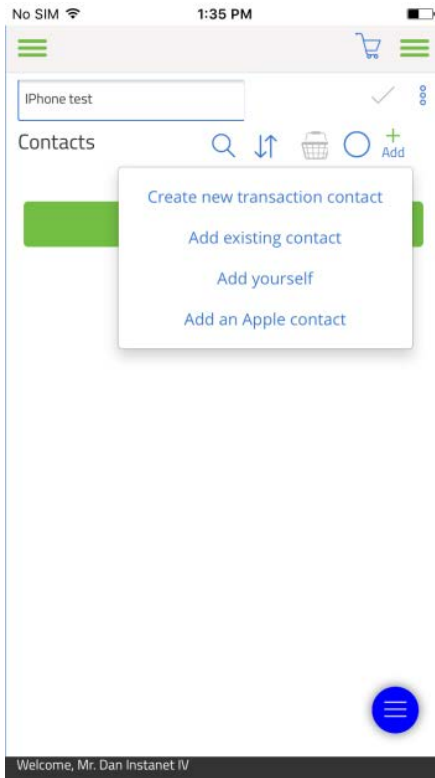


- Tap add  .
The Create Transaction window opens.
See “*Create a Transaction*” for more information on how to work in the Create Transaction window.

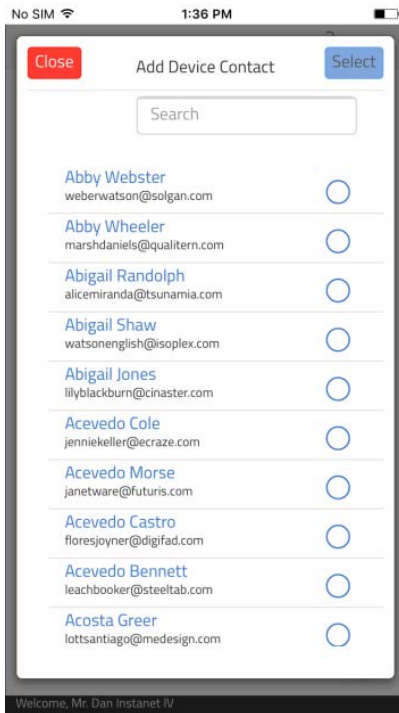
The Details tab of the transaction opens.

4. Tap the hamburger menu  in the top right hand corner.
The list of transaction tabs opens.
5. Tap **Contacts**.
The Contacts tab opens.

6. Tap Add   .
7. Use the dropdown to select **Add an Apple Contact**.

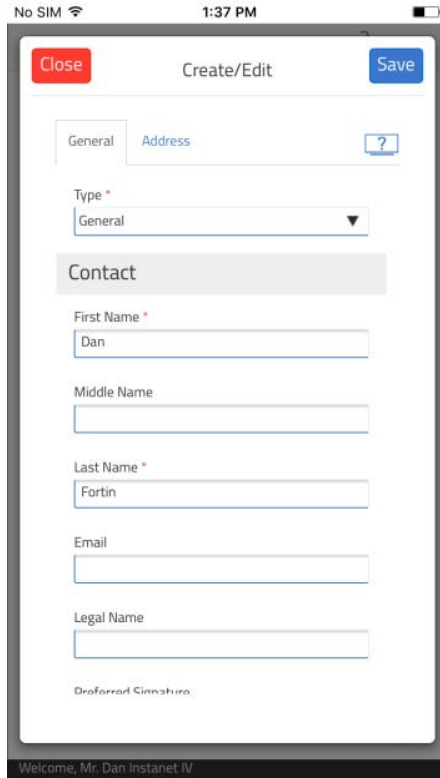


The Add Device Contact page opens and automatically populates a list based on your available Apple contacts.



8. Locate the contact you need to add to the transaction, and tap the circle next to their name. The circle changes to a green checkmark.
9. Tap **Select**.

The Create/Edit page opens.



10. Make any updates you need to make to the contact’s information, and then tap **Save**.

The Contacts tab opens.

A popup appears, informing you that your updates are saved.


The mobile contact is added to the list of contacts for this transaction.

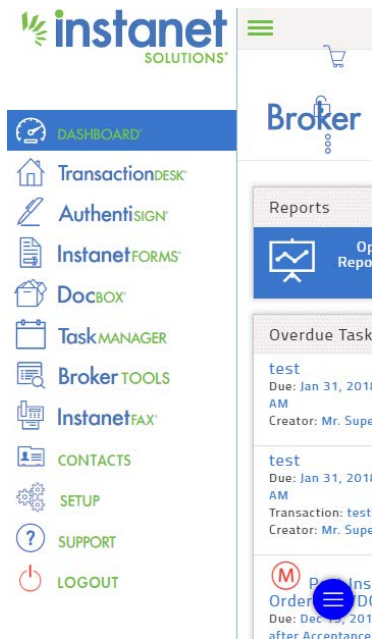
See “*Create a Contact*” for more information on adding contacts.

Notes:


- a. You can only add a single contact at a time.
- b. You can add as many contacts as you need to a transaction by repeating steps 6 – 10.

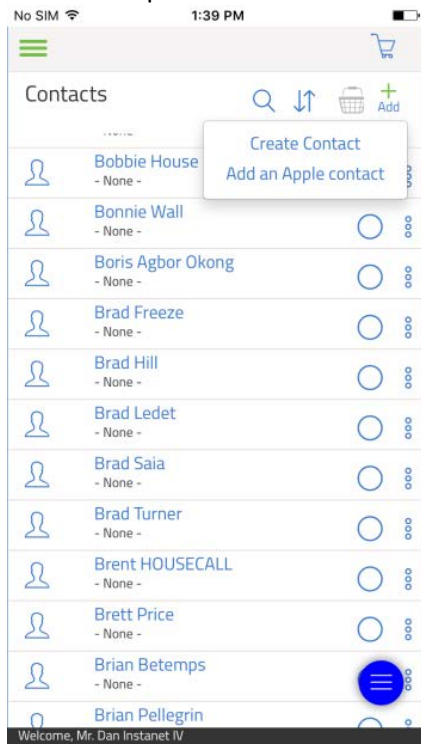
Import an Apple Contact into Your Address Book

1. On the dashboard of the app, tap the hamburger menu  in the top left corner. The TransactionDesk navigation menu expands.

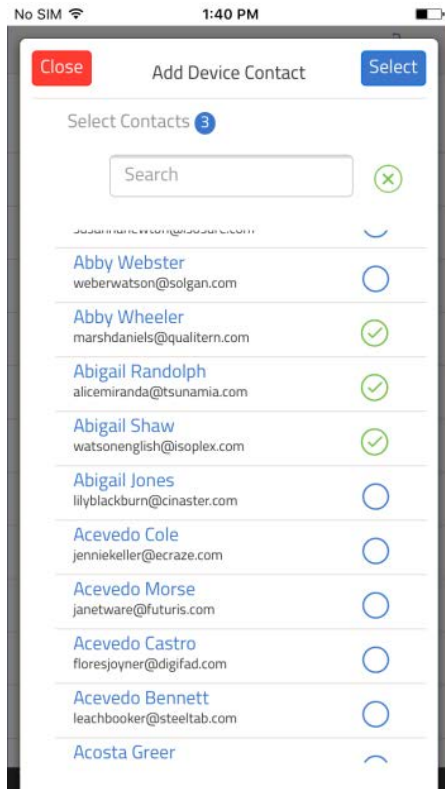


2. Tap **CONTACTS**.
The Contacts page opens.

3. Tap Add .
4. Use the dropdown to select **Add an Apple Contact**.




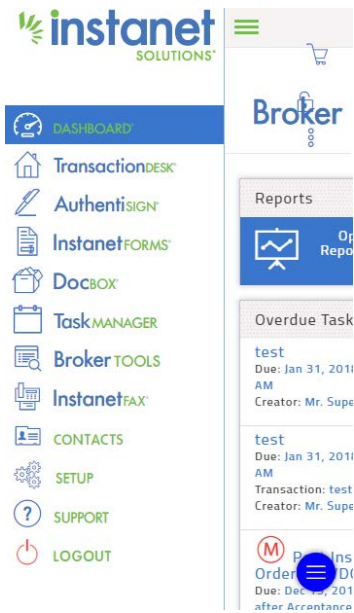
The Add Device Contact page opens and automatically populates a list based on your available Apple contacts.



5. Locate the contact you need to add to the transaction, and tap the circle next to their name. The circle changes to a green checkmark.
6. Tap **Select**.
The Contacts tab opens.
A popup appears, informing you that your updates are saved.
The mobile contact is added to the list of contacts.
Note: You can add as many contacts as you need at a time.


Import an Apple Contact into an Authentisign Signing

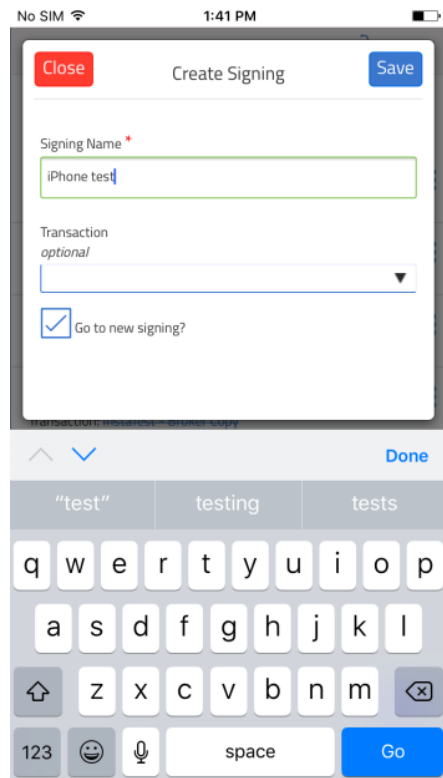
1. On the dashboard of the app, tap the hamburger menu  in the top left corner. The TransactionDesk navigation menu expands.



2. Tap **AUTHENTISIGN**.
The Authentisign page opens.

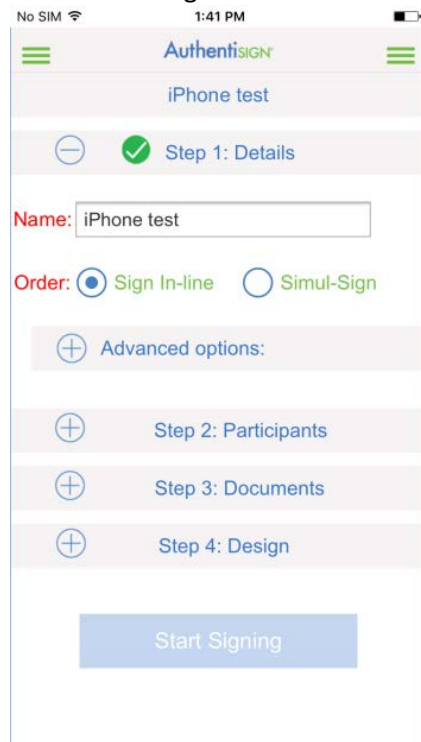


3. Do one of the following:
 - Tap the name of a signing in the list of signings.
 - Tap add  .
The Create Signing window opens.



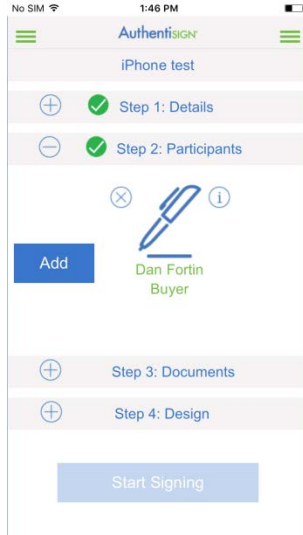
See *“Create a Signing”* for more information on how to work in the Create Signing window. The Details tab of the transaction opens.

The Authentisign wizard for the selected signing opens on Step 1: Details.



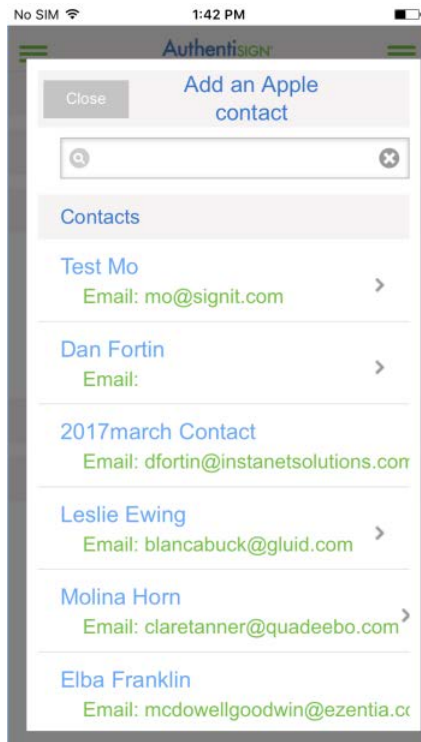
4. Tap **Step 2: Participants**.

The list of contacts for this transaction opens.



5. Tap **Add**.
6. Tap **Add an Apple Contact**.

The Add an Apple Contact page opens and automatically populates a list based on your available Apple contacts.



7. Locate the contact you need to add to the transaction, and tap the contact's name. The Authentisign wizard opens on Step 2: Participants. The contact is added to the signing.

Note: You can add a single contact at a time, but you can add as many contacts as you need to the signing by repeating steps 5 – 7.