



Unit 3

Managing Contacts, Part One

Learning Outcomes

By the end of this unit the learner will be able to:

- ✓ Add internal contacts
- ✓ Add external contacts
- ✓ Create contact groups
- ✓ Move contacts to existing groups
- ✓ Add contacts to the Favorites group
- ✓ Delete contacts and contact groups from your Contacts list


Unit 3

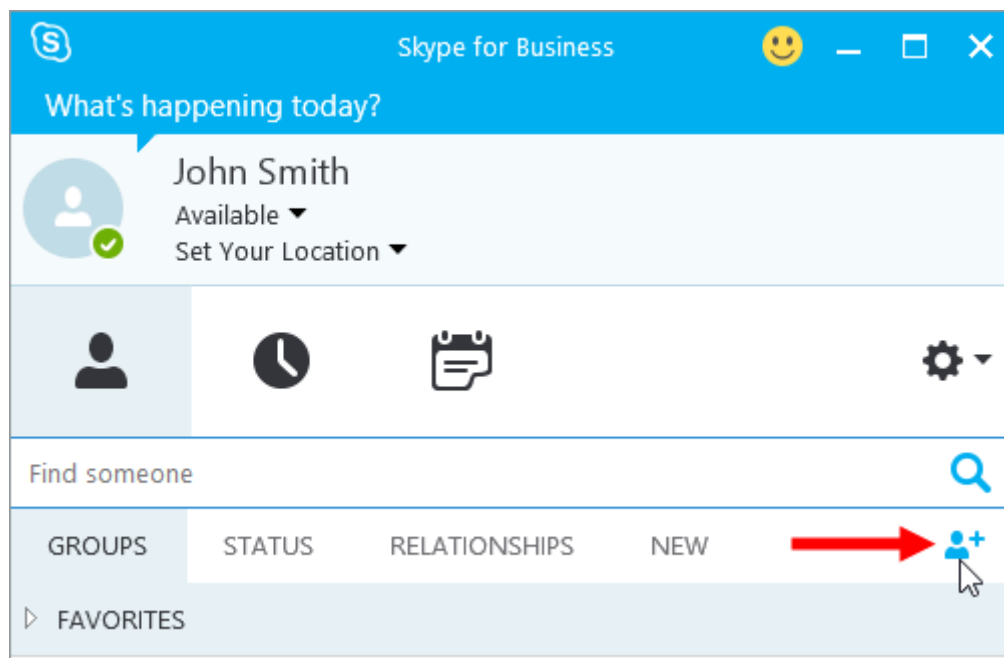
Managing Contacts, Part One

Adding Internal Contacts

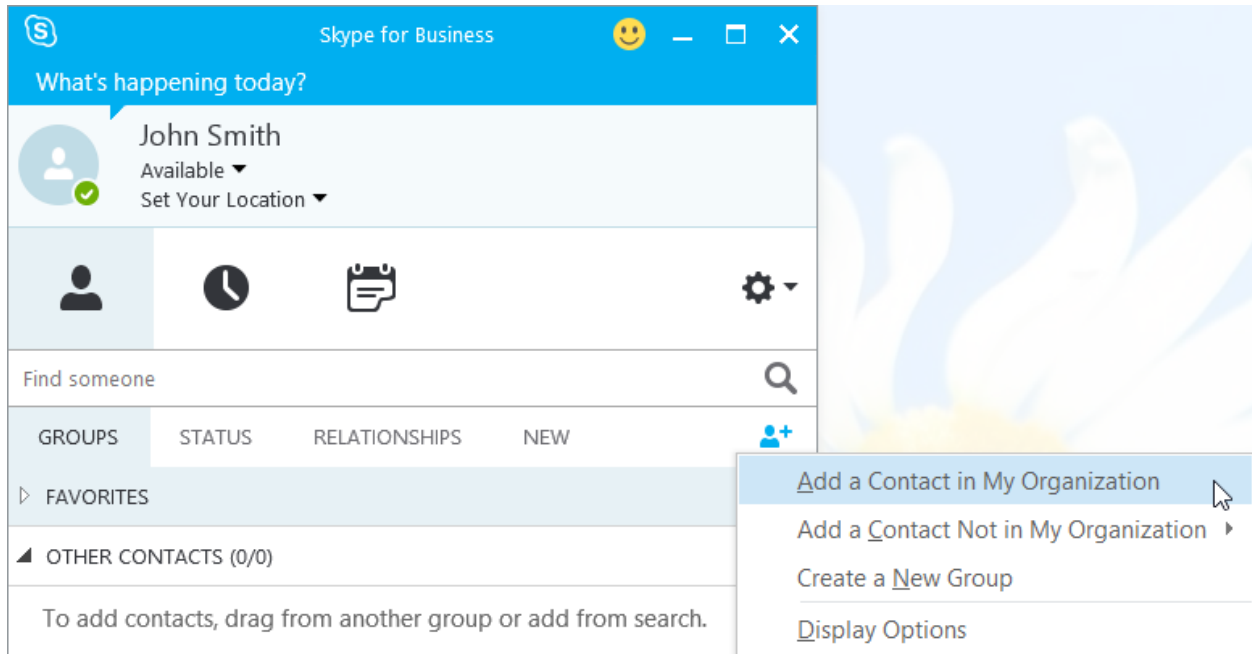
To begin, open Skype for Business and log into your account.

Contacts in Skype for Business are the online identities of those who you communicate with. Typically these will be colleagues from your organization; however, some organizations allow you to add outside (external) contacts. This is useful if you frequently contact outside customers, businesses, or friends.

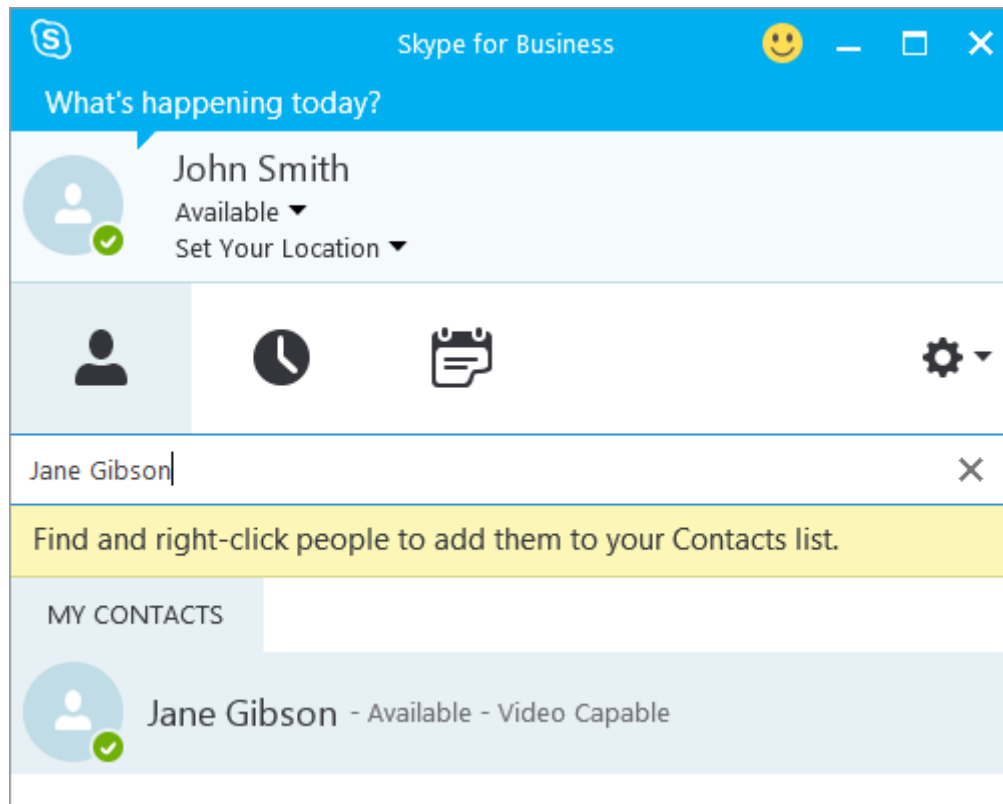
To add an internal contact to your Contacts list, click the “Add a Contact” button () that appears on the right side of the Skype for Business window:



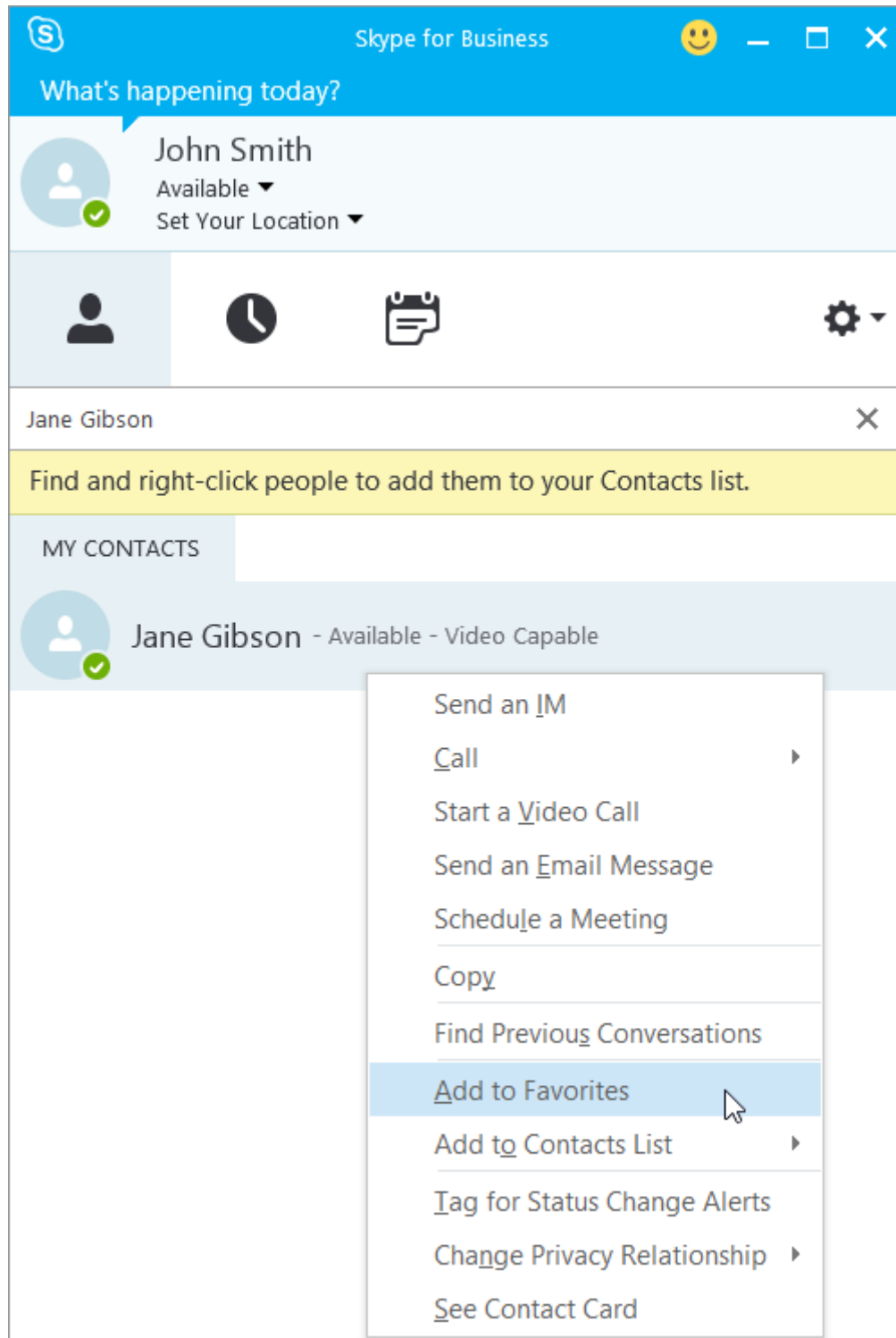
A menu will appear that allows you to choose between adding a contact from within your organization or one from outside of it. Click “Add a Contact in My Organization:”



Upon clicking this option, the search box on the Skype for Business window will be selected. Type the name of the contact that you would like to add to your Contacts list. The results from this query will automatically be listed below the search field:

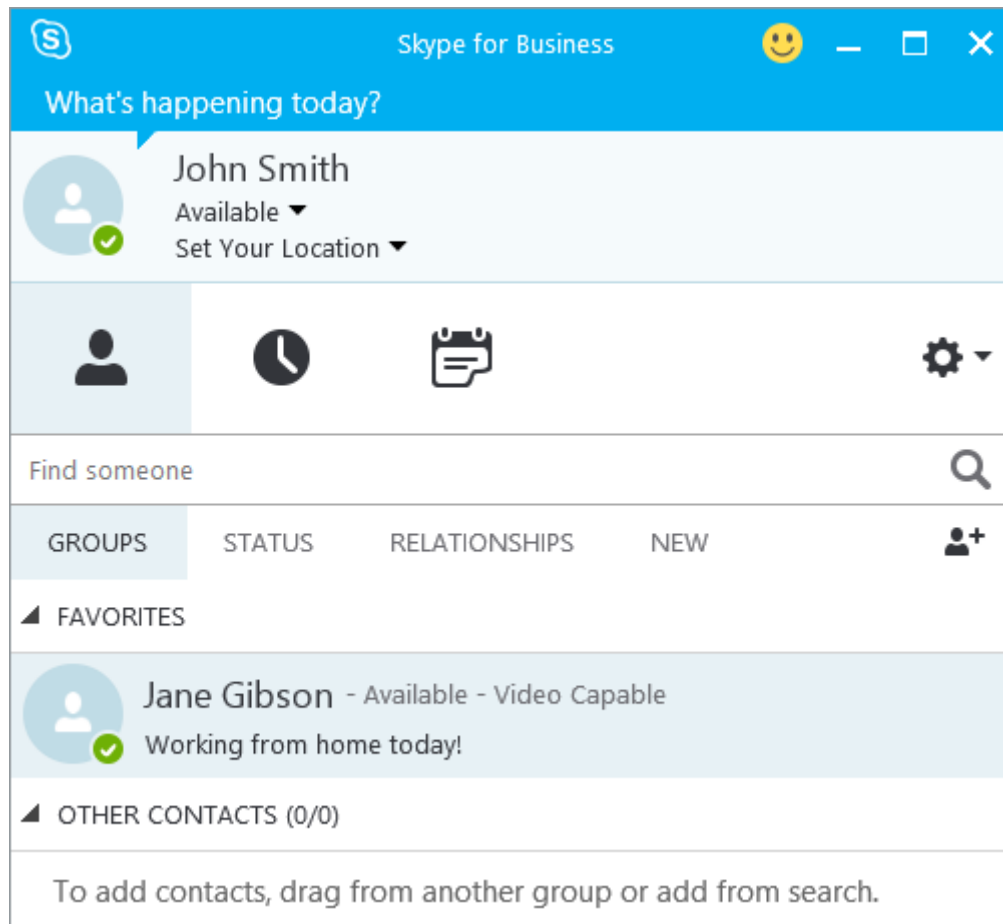


Right-click on the contact in question. Then, click “Add to Favorites” to add them to the Favorites group:



Alternatively, you could also click Add to Contacts List → [group] to add the contact to a specific contact group that exists in your contacts list.

The new contact will now be listed inside the group that you selected. In this example, the selected contact has been added to the Favorites group:




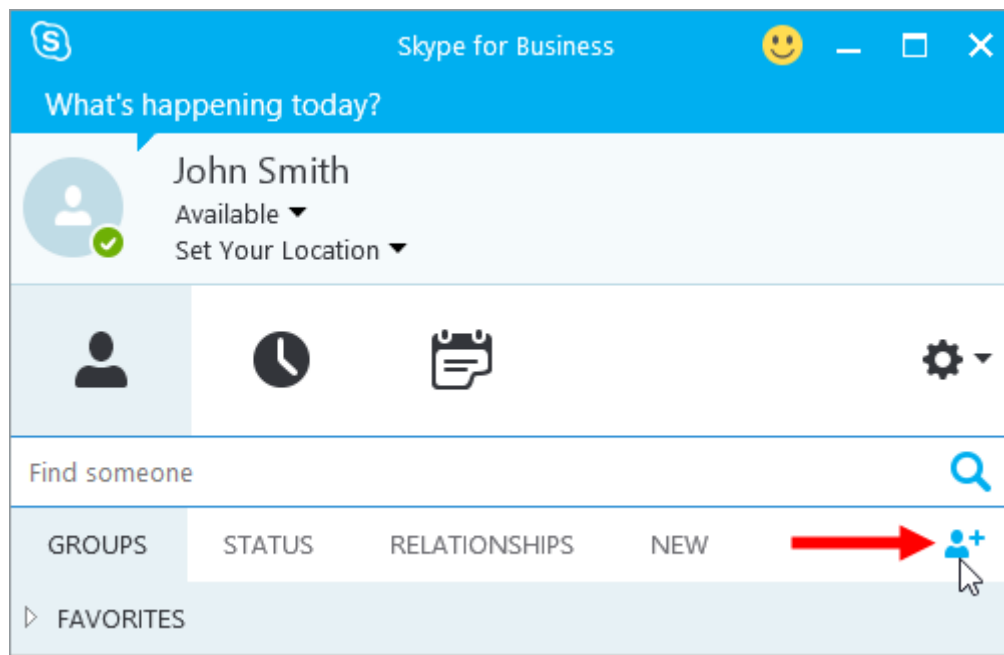
Once a person has been added as a contact, you will be able to see their status, personal notes, their work location, and what features the device that they are running Skype for Business on supports. In the example above, you can see that the contact is available and can accept video calls.

Adding External Contacts

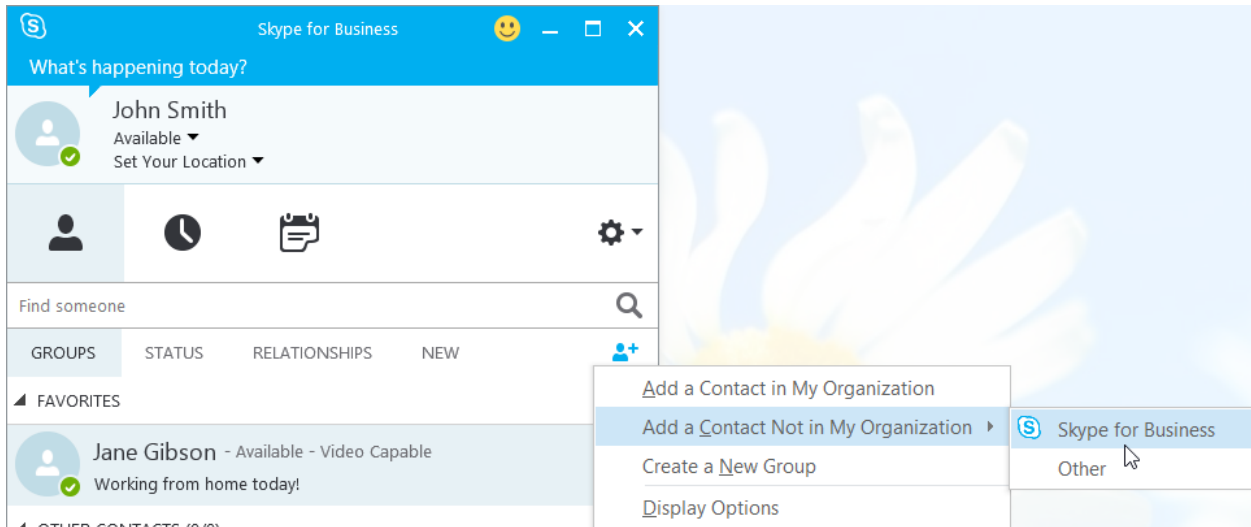
Instructor Tip: In order to complete this exercise, the server that students use must allow for external communications. If this is not possible treat this topic as a conceptual lesson.

To begin, open Skype for Business and log into your account if you have not already done so.

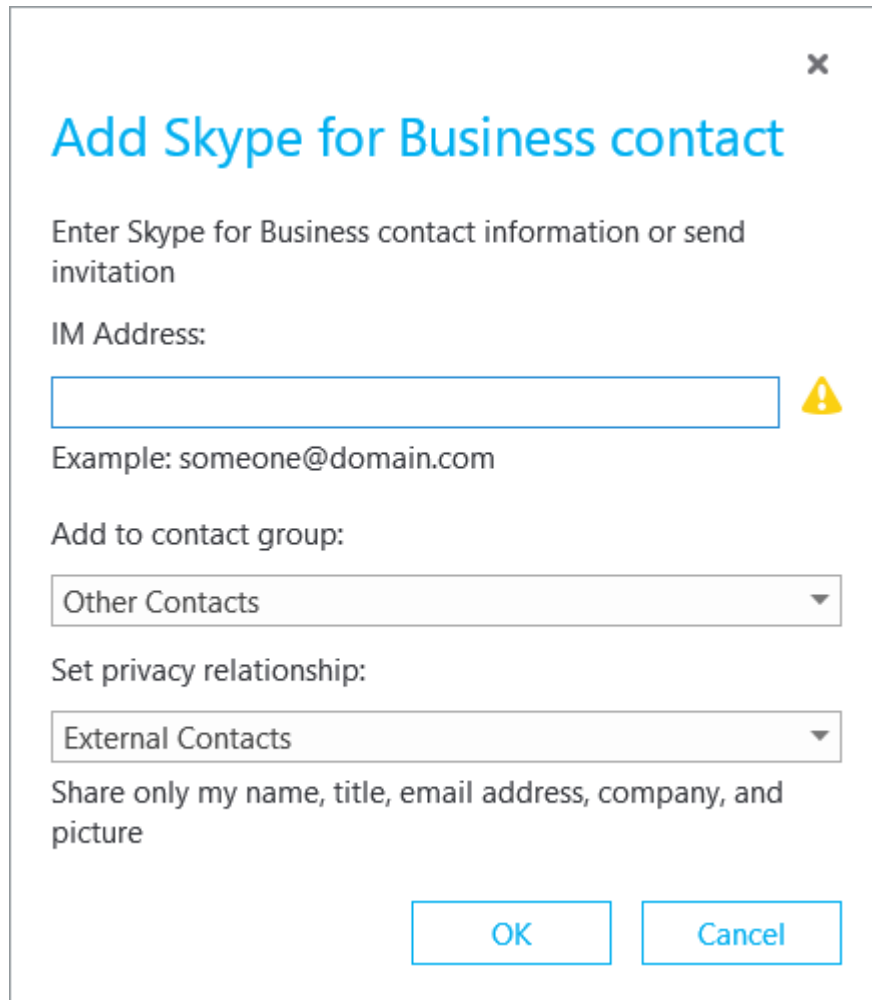
Some organizations allow Skype for Business users to add contacts to their contact list from outside of their own organization. If yours is such an organization, click the “Add a Contact” button () on the right side of the Skype for Business window:



From the menu that appears, choose the “Add a Contact Not in My Organization” option. This sub-menu will give you the option to add contacts that use Skype for Business, or another network. Click on the option that matches the type of contact that you are adding:



A dialog will be displayed in which you need to enter the information for the contact that you are adding:



The image shows a dialog box titled "Add Skype for Business contact" with a close button (X) in the top right corner. The dialog contains the following elements:

- Instructional text: "Enter Skype for Business contact information or send invitation"
- Label: "IM Address:"
- Input field: A text box for the IM address, currently empty, with a yellow warning triangle icon to its right.
- Example text: "Example: someone@domain.com"
- Label: "Add to contact group:"
- Dropdown menu: A dropdown menu showing "Other Contacts" with a downward arrow.
- Label: "Set privacy relationship:"
- Dropdown menu: A dropdown menu showing "External Contacts" with a downward arrow.
- Text: "Share only my name, title, email address, company, and picture"
- Buttons: "OK" and "Cancel" buttons at the bottom right.

Enter the IM address for the contact that you are adding into the appropriate field. Usually this is the contact's e-mail address:

✕

Add Skype for Business contact

Enter Skype for Business contact information or send invitation

IM Address:

✓

Example: someone@domain.com

Add to contact group:

Set privacy relationship:

Share only my name, title, email address, company, and picture

OK

Cancel

(Note that a green checkmark icon will appear when you enter a valid e-mail address.) The next control in this dialog allows you to choose the contact group in which you want this contact added. By default this will be set to Other Contacts:

×

Add Skype for Business contact

Enter Skype for Business contact information or send invitation

IM Address:

 ✓

Example: someone@domain.com

Add to contact group:

 ▼

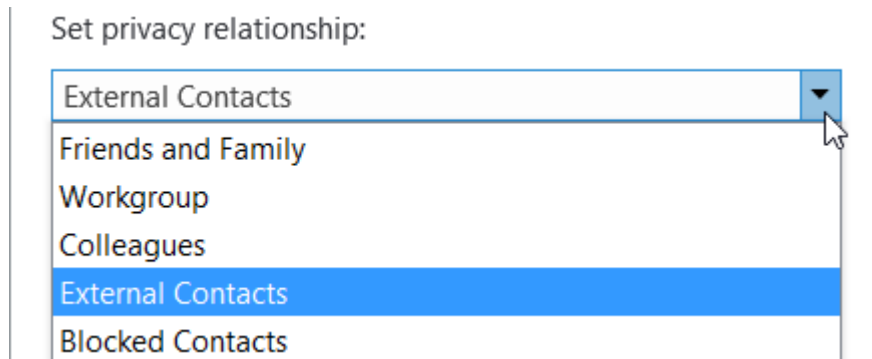
Set privacy relationship:

 ▼

Share only my name, title, email address, company, and picture

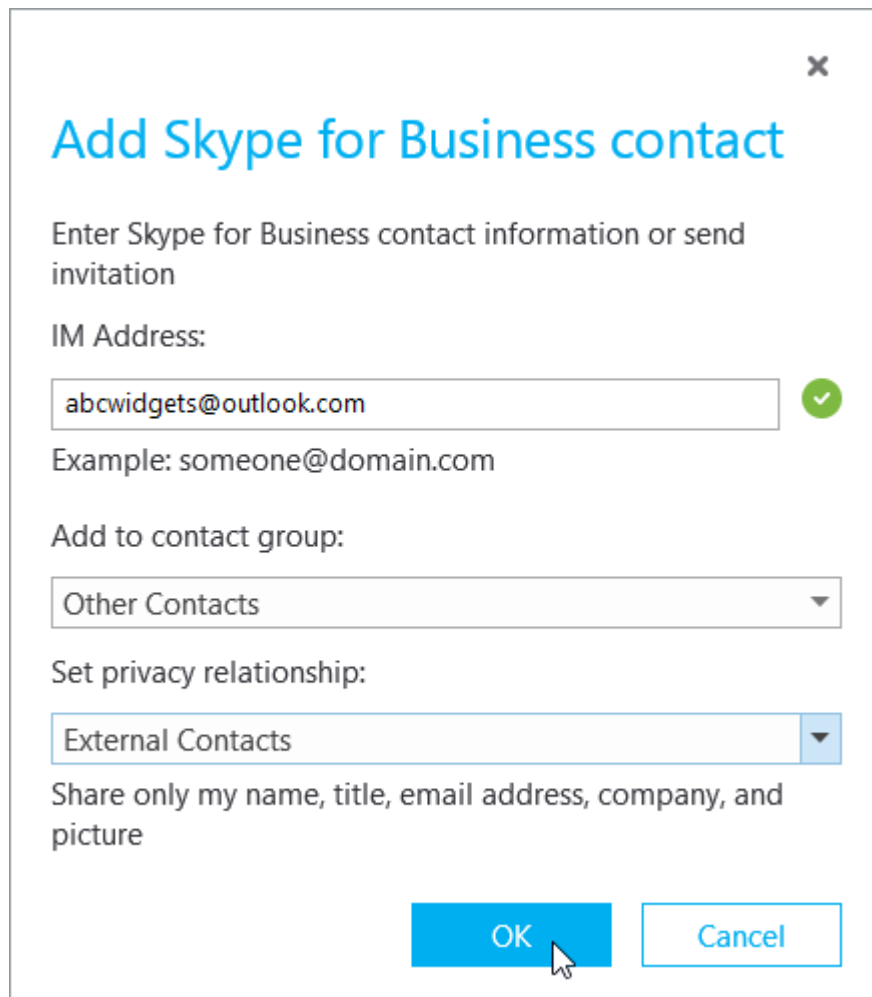
OK Cancel

Next, you can choose how much information you would like to share with this new contact. For security purposes, this setting will be set to External Contacts by default. This setting will only share your name, e-mail address, company, and profile picture with this new contact. Click on this drop-down menu. You will be able to choose from a variety of different privacy relationship levels, each with their own level of sharing:



The image shows a dropdown menu titled "Set privacy relationship:". The menu is open, displaying several options: "External Contacts", "Friends and Family", "Workgroup", "Colleagues", "External Contacts" (highlighted in blue), and "Blocked Contacts". A mouse cursor is pointing at the dropdown arrow on the right side of the menu.

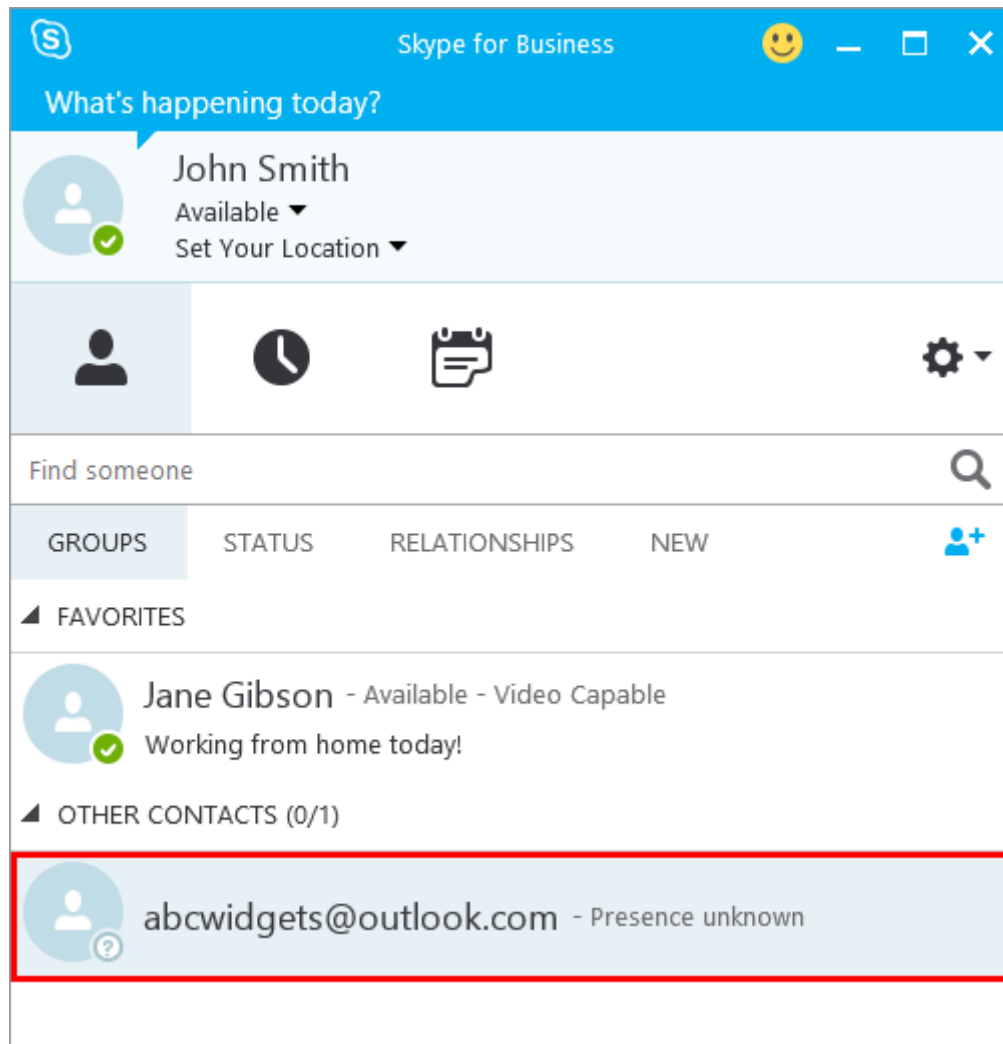
For this example, leave External Contacts selected. Click OK to add the new contact:



The image shows a dialog box titled "Add Skype for Business contact" with a close button (X) in the top right corner. The dialog contains the following fields and options:

- Enter Skype for Business contact information or send invitation**
- IM Address:** A text input field containing "abcwidgets@outlook.com" with a green checkmark icon to its right. Below it is an example: "Example: someone@domain.com".
- Add to contact group:** A dropdown menu showing "Other Contacts".
- Set privacy relationship:** A dropdown menu showing "External Contacts".
- Share only my name, title, email address, company, and picture**
- At the bottom, there are two buttons: "OK" (highlighted in blue) and "Cancel".

The new contact will now be listed inside the group that you selected (Other Contacts in this case):

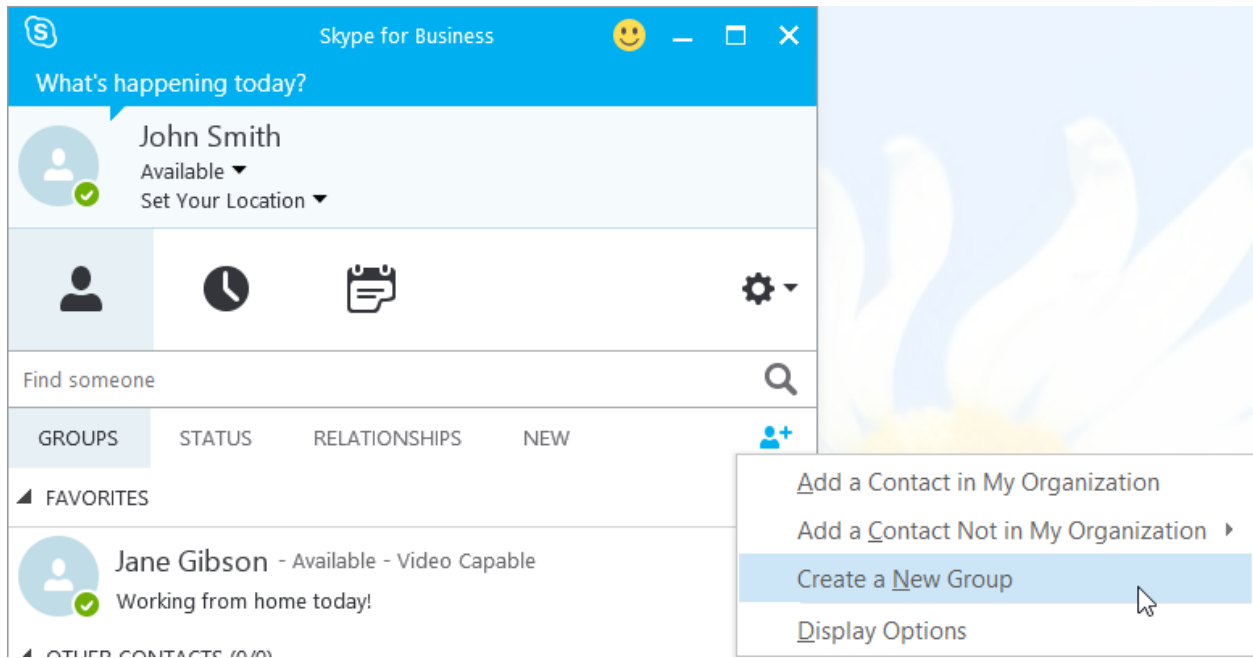


Creating Contact Groups

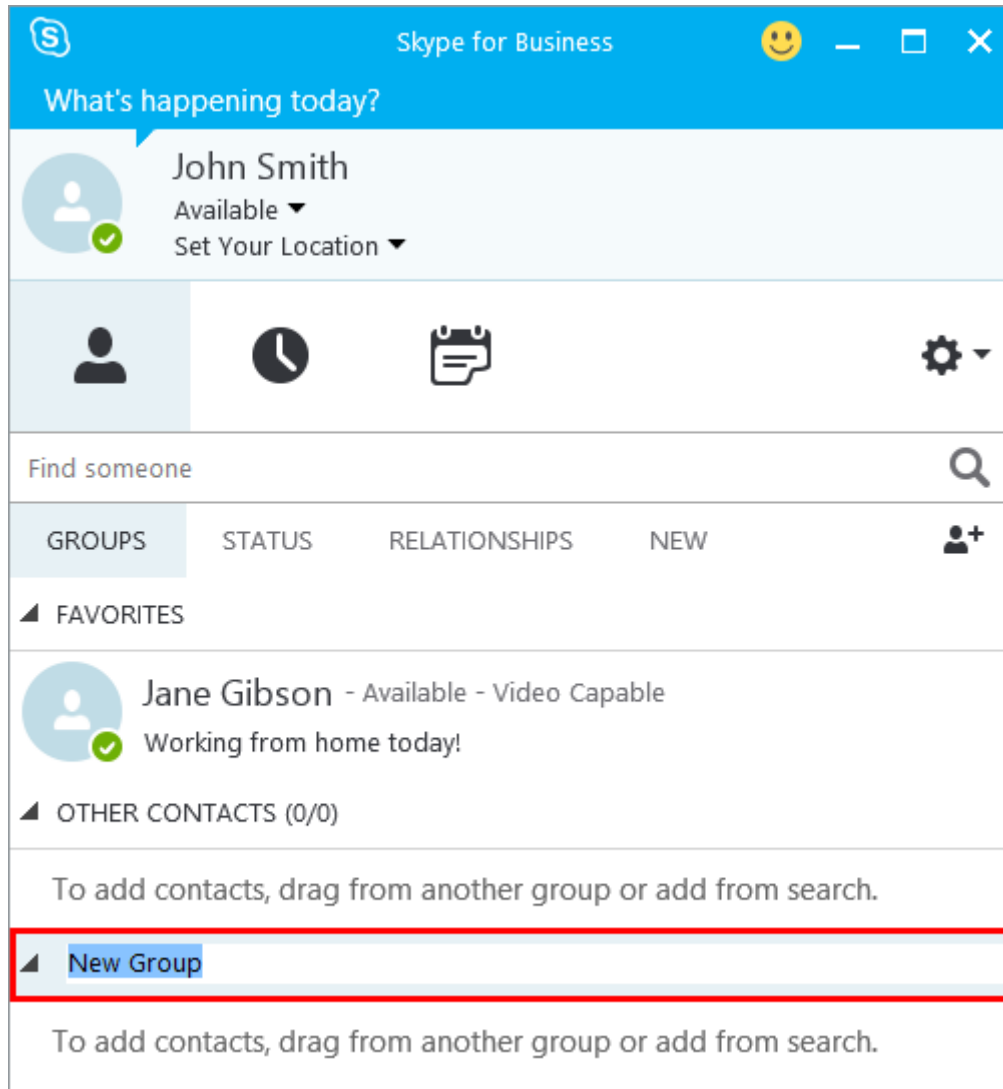
To begin, open Skype for Business and log into your account if you have not already.

Contact groups are used to organize your Contacts list in a meaningful way. By default, Skype for Business includes two primary groups: Favorites and Other Contacts. The Favorites group lists any contacts that you have explicitly marked as a favorite, while the Other Contacts group is generally used to hold any other contact that you might have. Keep in mind that contacts can be displayed in both the Favorites group as well as another at the same time. Additionally, the Away and Offline Contacts group may appear and list any of contacts that use one of those statuses.

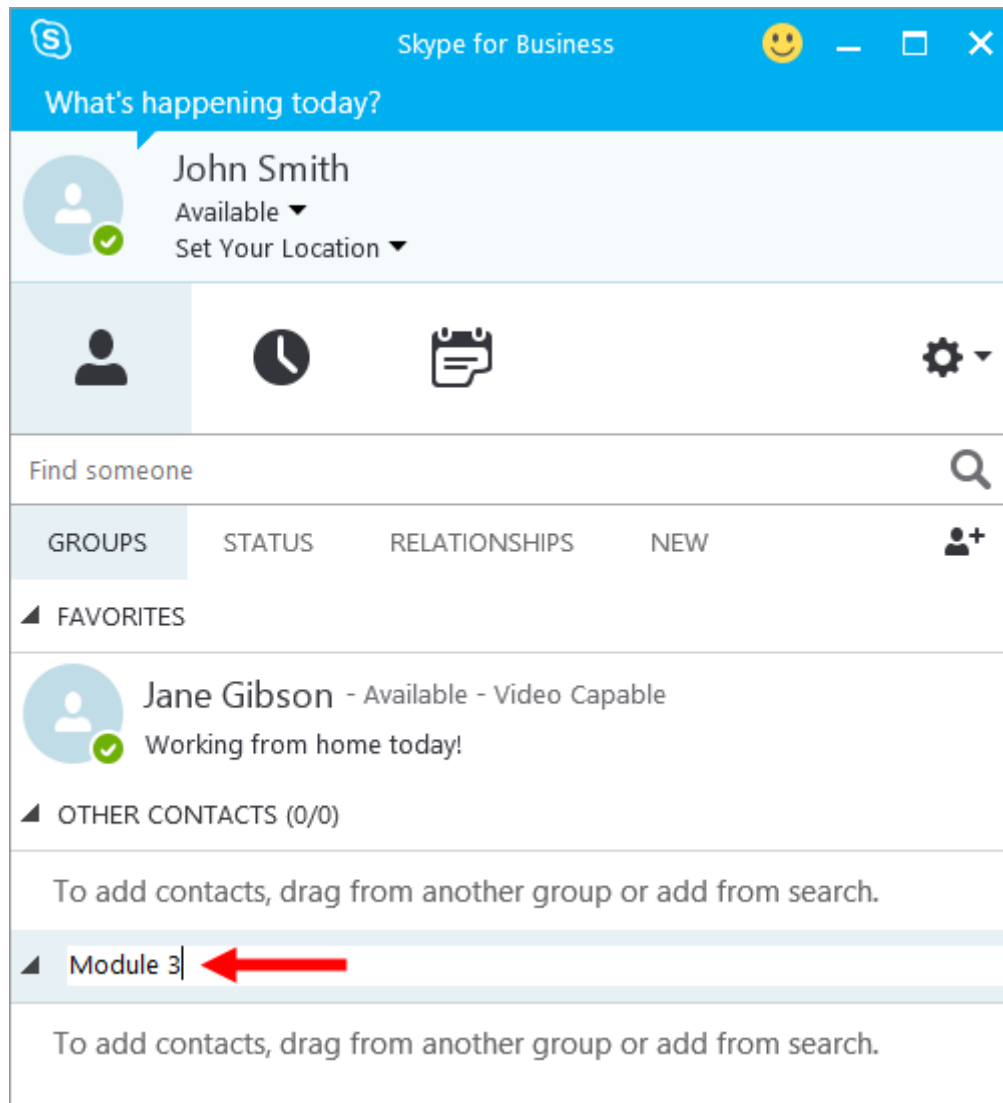
To create a new contact group, click Add a Contact (👤+) → Create a New Group:



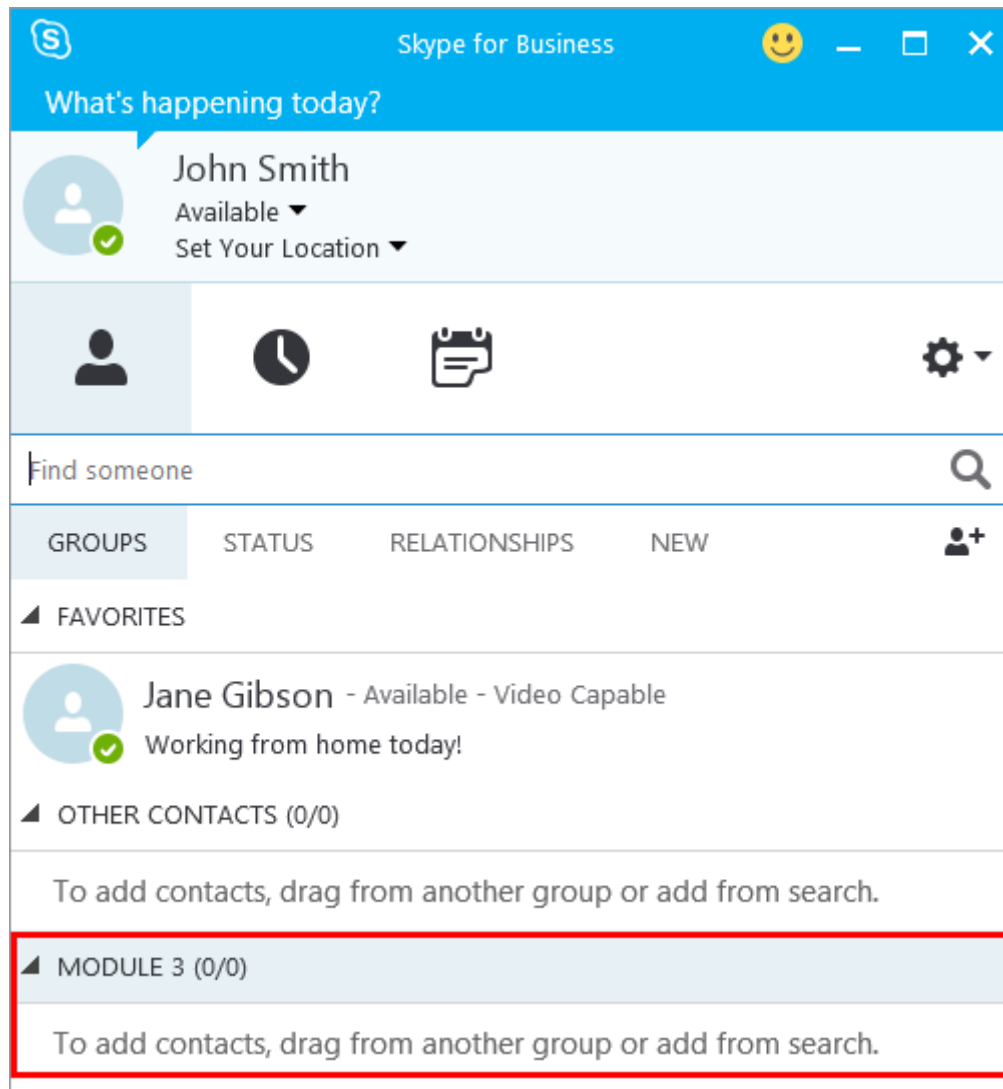
A new group will be added to your Contacts list with the group title selected:



For this example, type “Module 3” into the provided text area:



When you're done, press Enter to apply the new name:

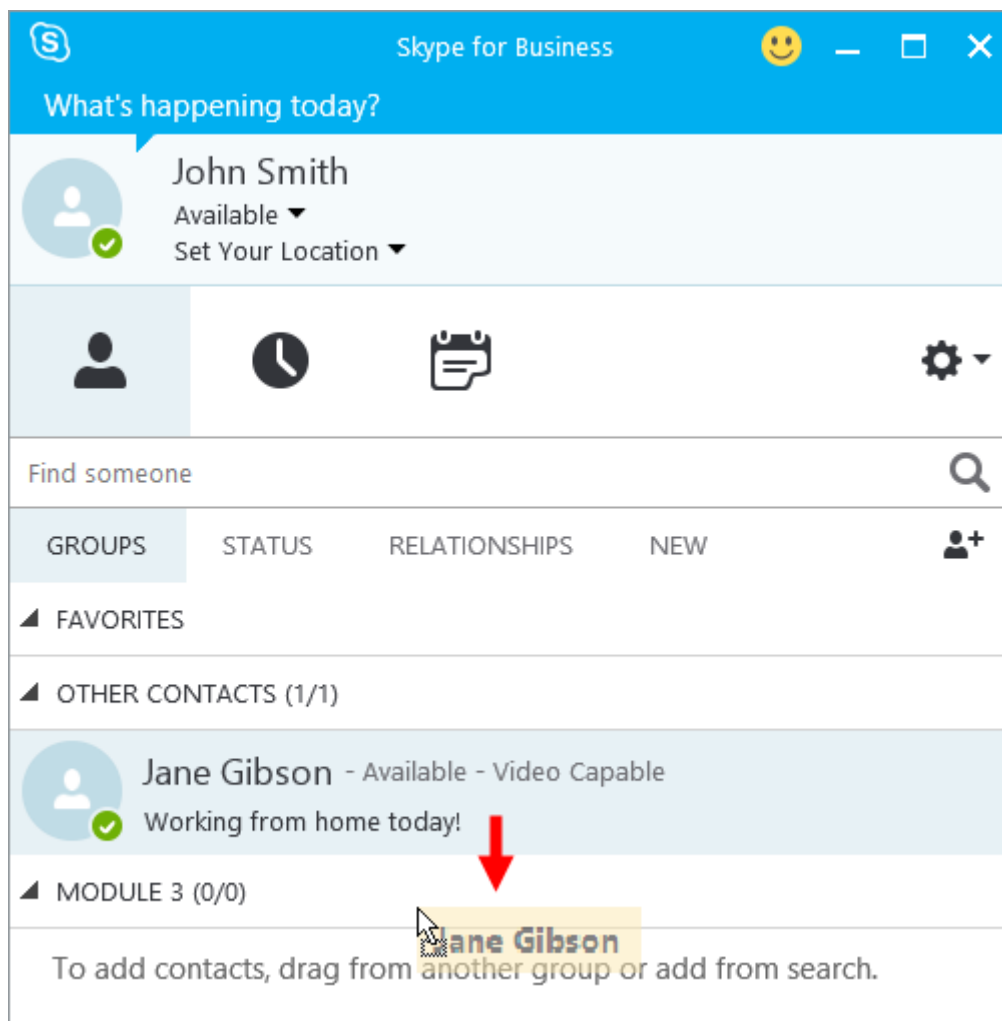


With the new group now created, you can now move contacts into it.

Moving Contacts to Groups

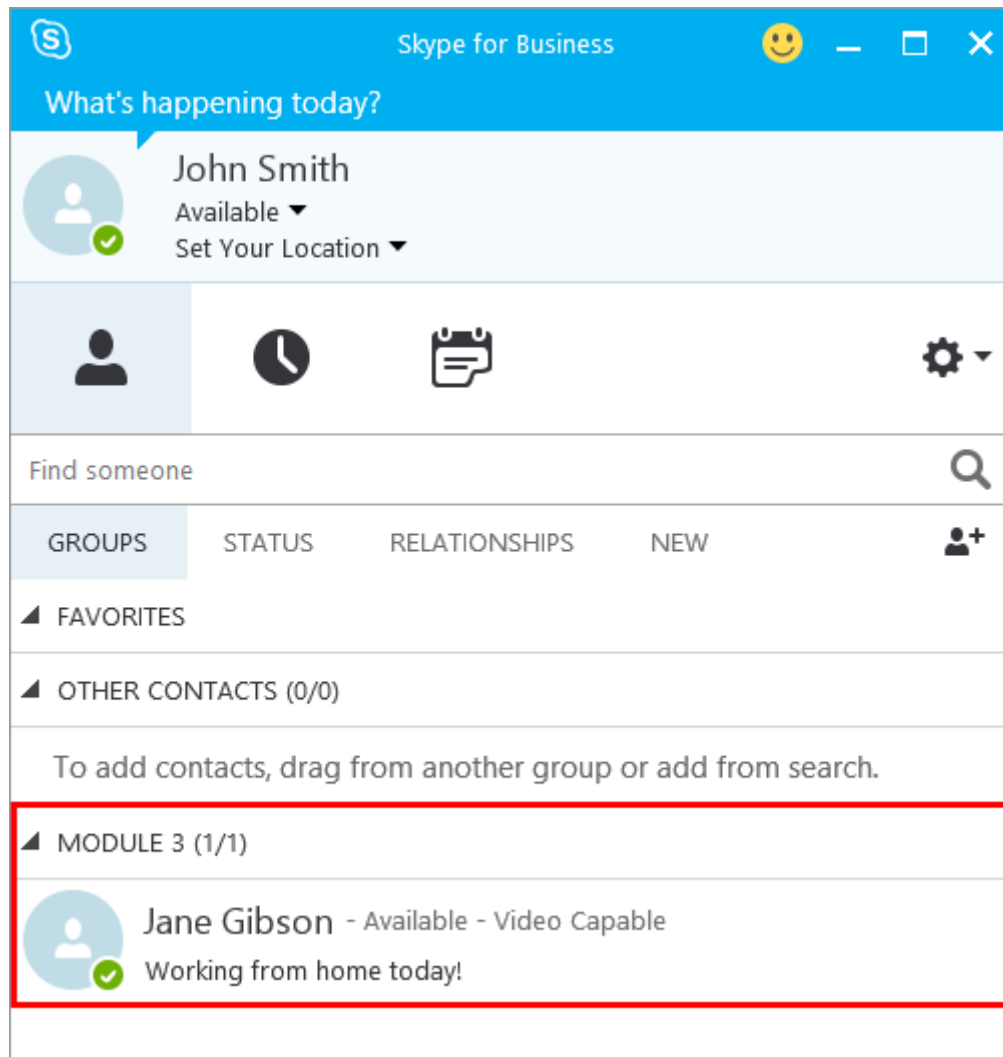
To begin, open Skype for Business and log into your account. If you have not already done so, add one contact (internal or external) and create a new contact group that is labeled Module 3.

Clicking and dragging allows you to move contacts to and from the various groups that appear on your Contacts list. For this example, click and drag one contact on your Contacts list to the title bar of the Module 3 group:



Instructor Tip: Dragging a contact directly inside a target group will not work. You must drag a contact to the title area of the target group.

Release the mouse button. The contact in question will appear within the target group:



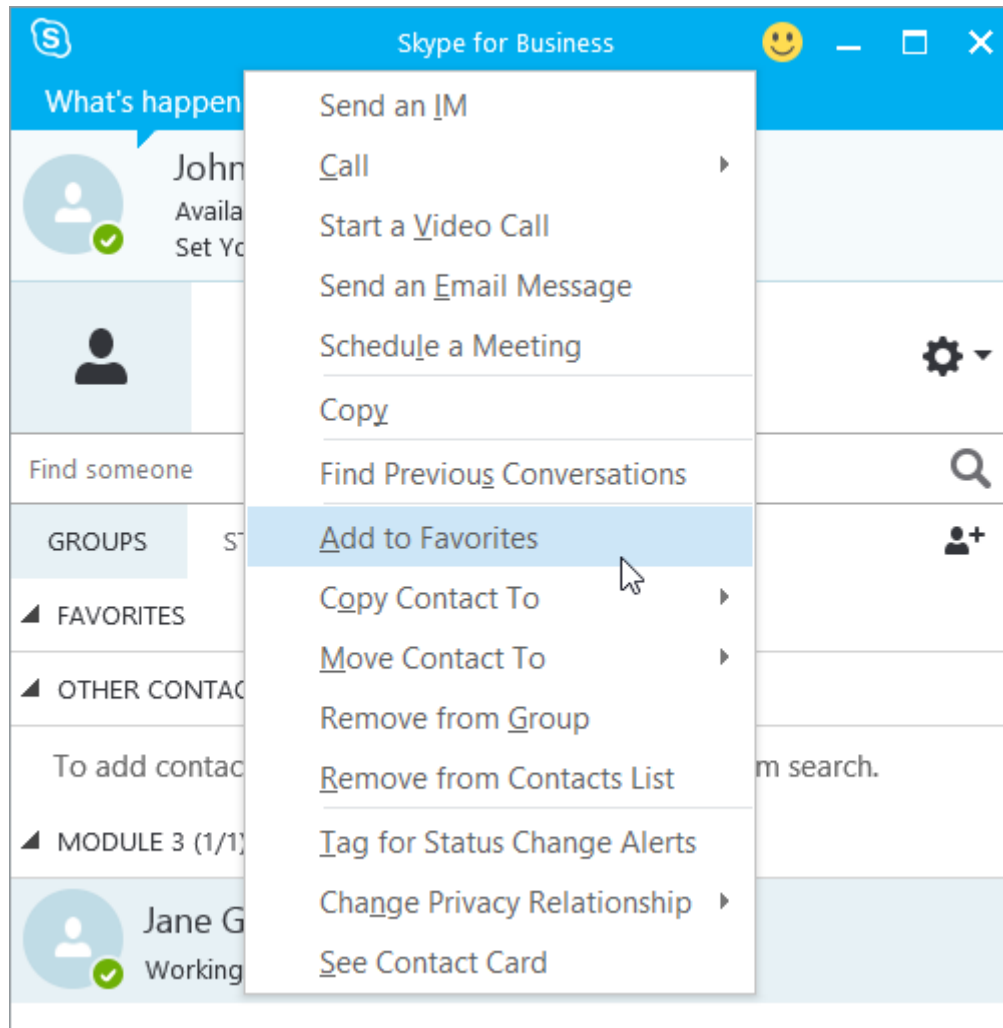
(Note that the title of each group contains a count of the number of contacts that appear within it.)

Adding Contacts to Your Favorites

To begin, open Skype for Business and log into your account. If you have not already done so, add one contact (internal or external) to a group.

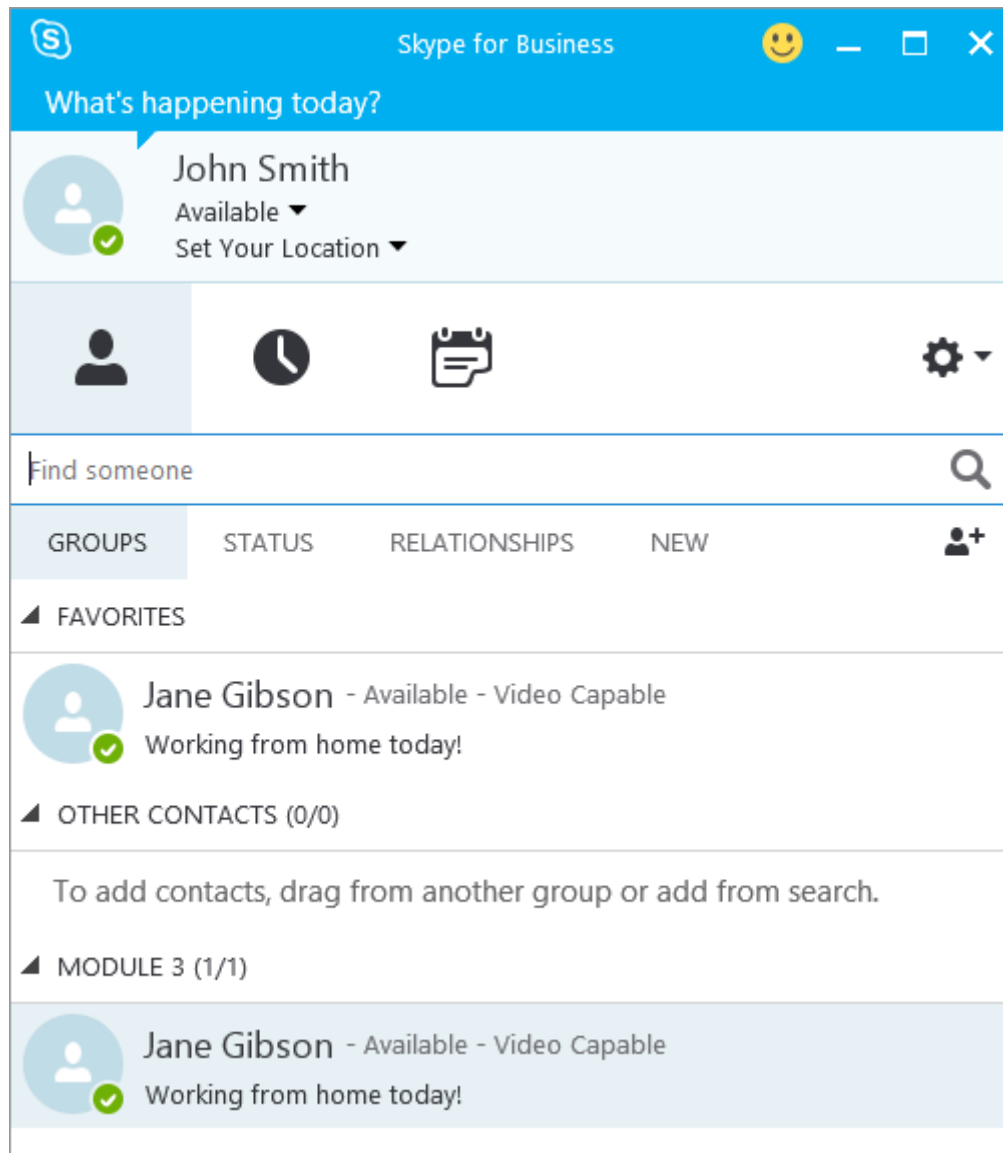
The Favorites group is where you can place your most frequently contacted or otherwise important contacts without having to move them from their existing group (unless the existing group is Other Contacts).

To add a contact to the Favorites group, right-click on the contact in question and click “Add to Favorites:”



(Note that you can also add contacts to the Favorites group using the drag-and-drop method.)

The selected contact will now appear in both its existing group and the Favorites group:

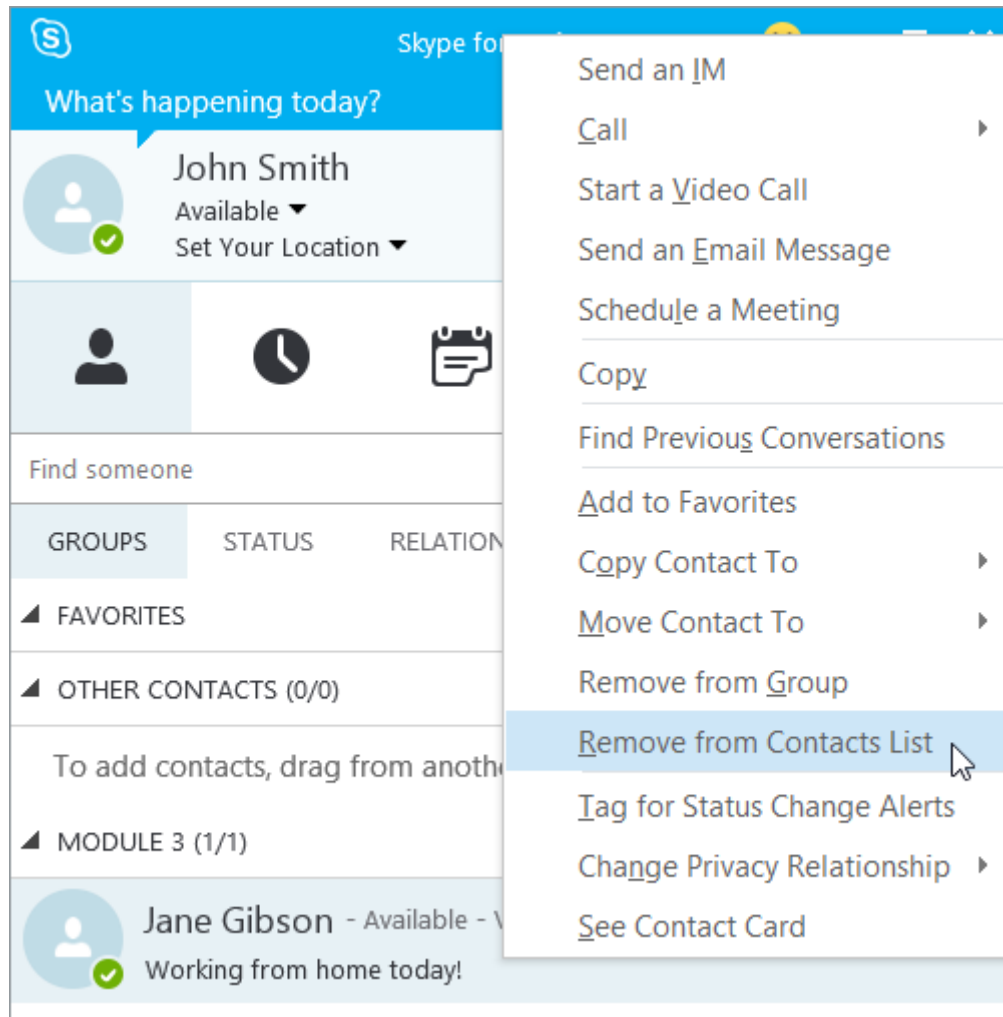


(To remove a contact from your Favorites, right-click on the contact and then click Remove from Favorites.)

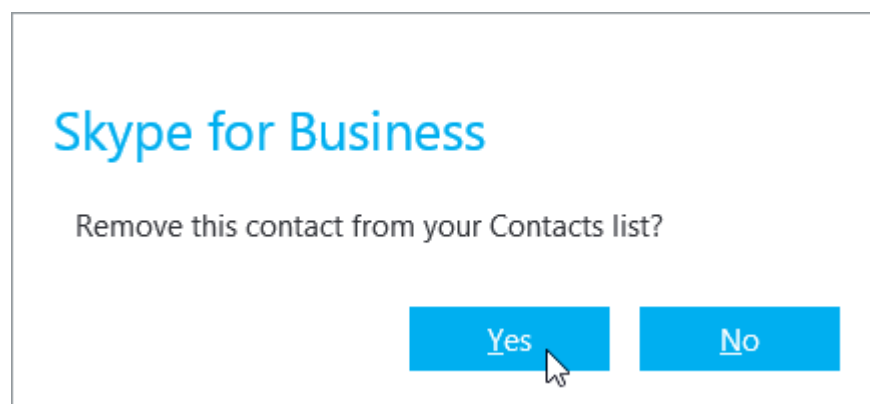
Deleting Contacts and Contact Groups

To begin, open Skype for Business and log into your account. If you have not already done so, add one contact (internal or external) to a new or existing custom group in your Contacts list. As well, create a new contact group that is labeled Module 3.

To remove any contact from your Contacts list, right-click on the contact in question and click "Remove from Contacts List:"

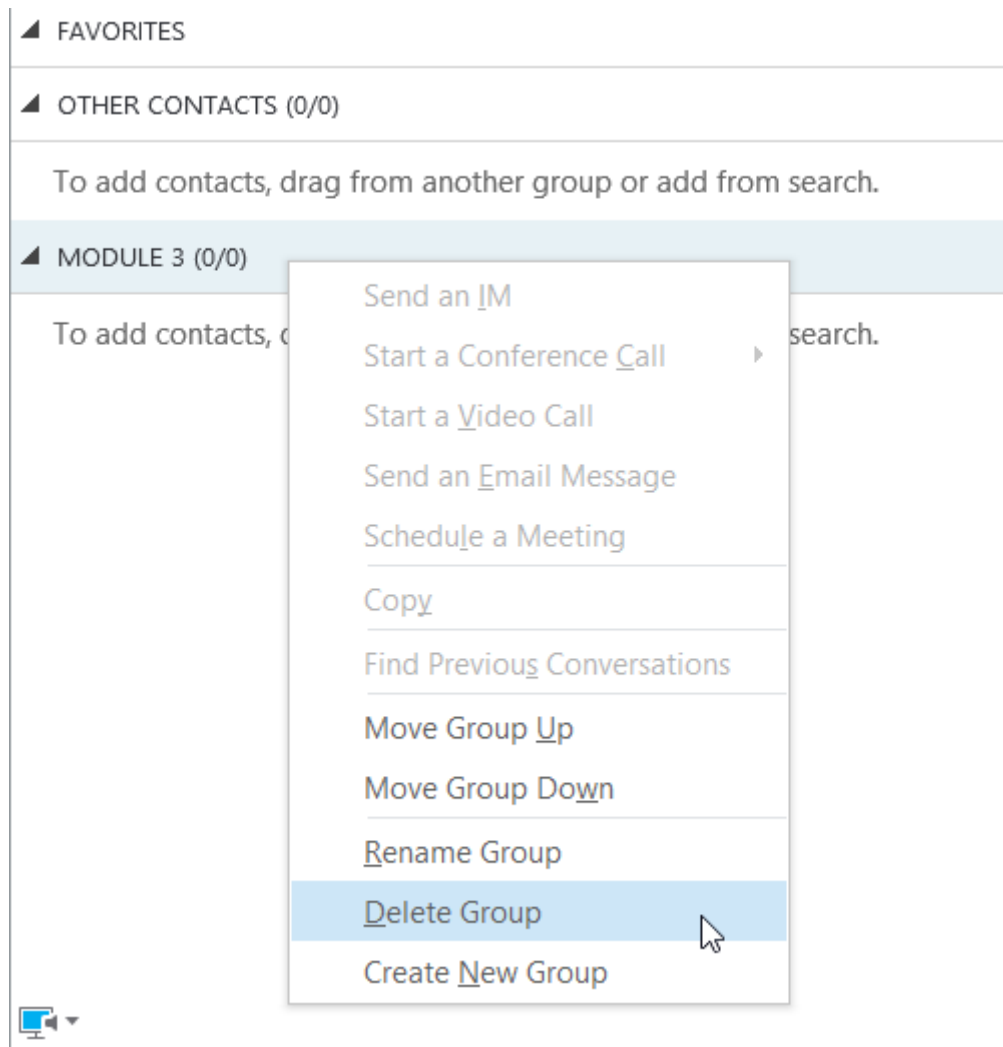


A dialog will appear that asks you to confirm your choice of removing the selected contact from your Contacts list. Click Yes:



The contact will then completely be removed. Note that this procedure cannot be undone. If you accidentally remove a contact, you will need to add them again manually.

To delete a custom group, right-click on the custom group name (Module 3 in this example) and then click Delete Group:



The selected group will immediately be deleted. Note that this action will also delete any contacts that have been placed inside of this group as well.