

# **How-to – Contact List**

## **V0.1 - Global Marketing Technology-AEM**

**Component Name: Contact List**

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**Version:** [V0.1](#)

# 1 Document History

The following important changes have been made to this document:

| Date            | Version # | Description of Changes Made | Author      | Approved By |
|-----------------|-----------|-----------------------------|-------------|-------------|
| August 19, 2020 | v.1       | Final                       | Syed Faheem |             |

## 2 Introduction

This document provides “How to Instructions” for the Contact List component.

### 2.1 Short Description

Contact List component provides an Author an ability to display contact details.in filter or non-filter formats.

#### Feature Overview

- A user can view MetLife Office Contact details on a page in filter or non-filter formats.
- A Contact List file(CSV) needs to be uploaded to render contact details.
- No Results Found Title – title in case no results are found in filtering
- No Results Found Message – message in case no results are found in filtering

## 2.2 Intended Audience

The primary audience of this design is:

- Content Authors
- Agencies
- Marketers

## 3 How to Enable/Turn-On the Component

To enable this component you must first create a CSV for the dynamic content a sample CSV can be found below

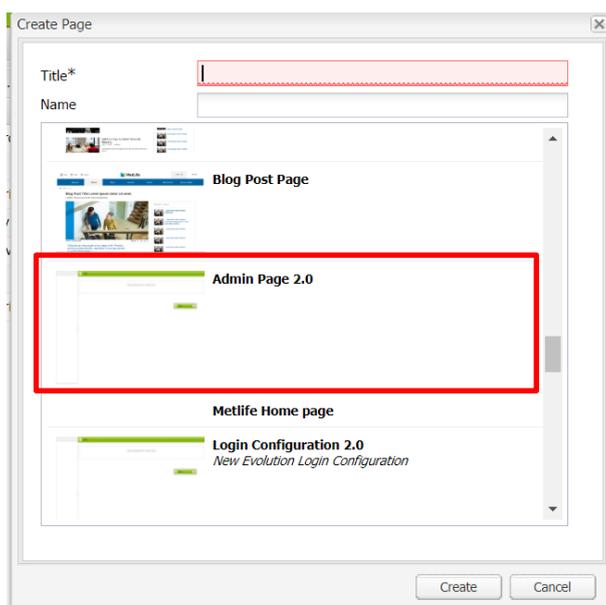


contact-list-demo.csv

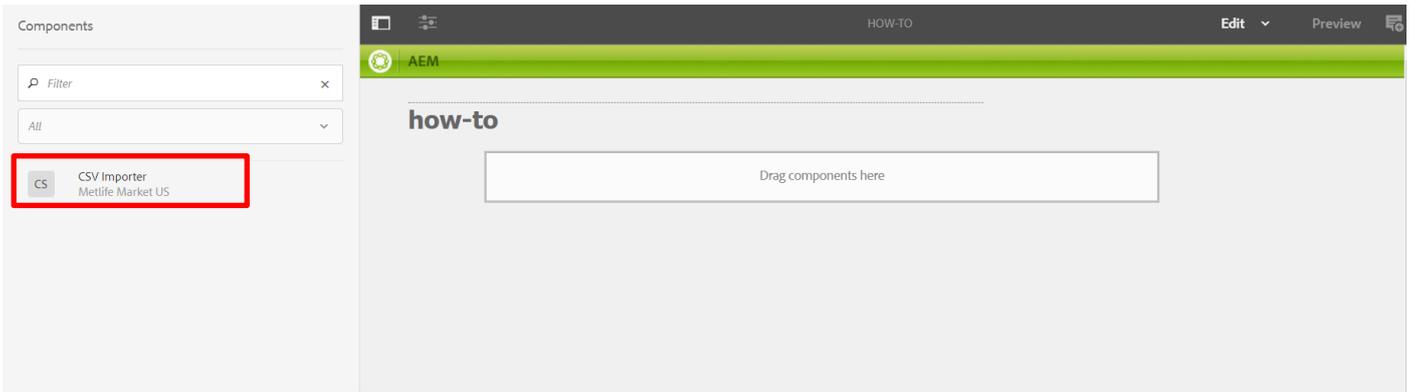
Once you have created your contact list CSV you must go into your specific country configurations folder

“Content/metlife/\*\*market\*\*/configuration”

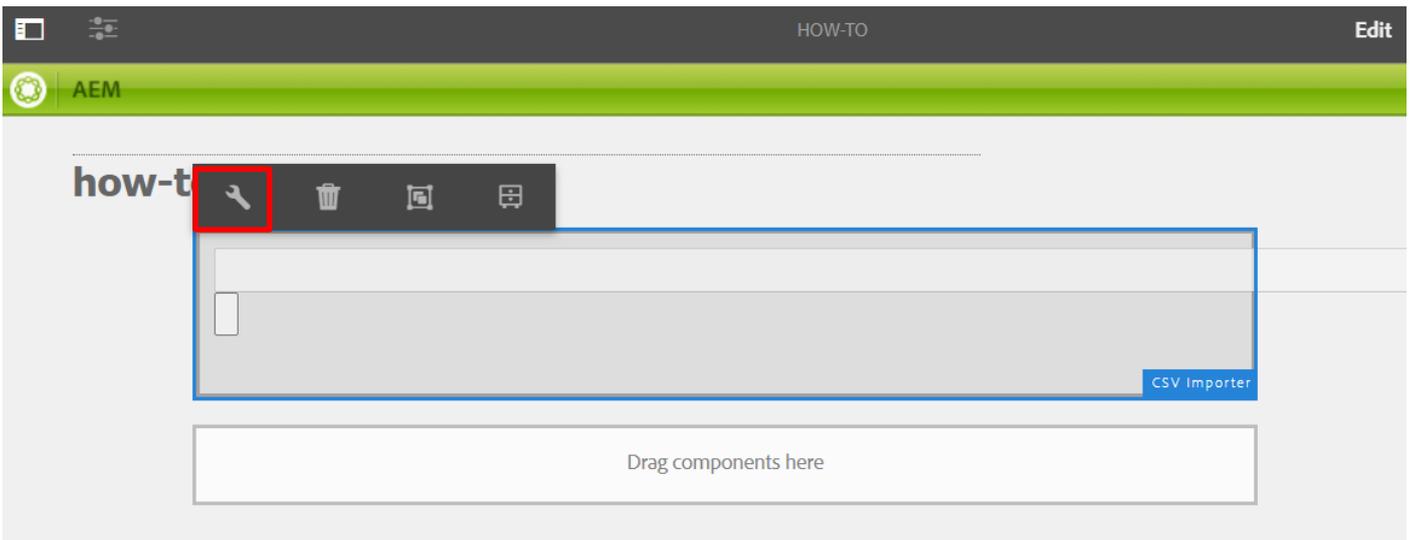
And create an Admin Page 2.0 template



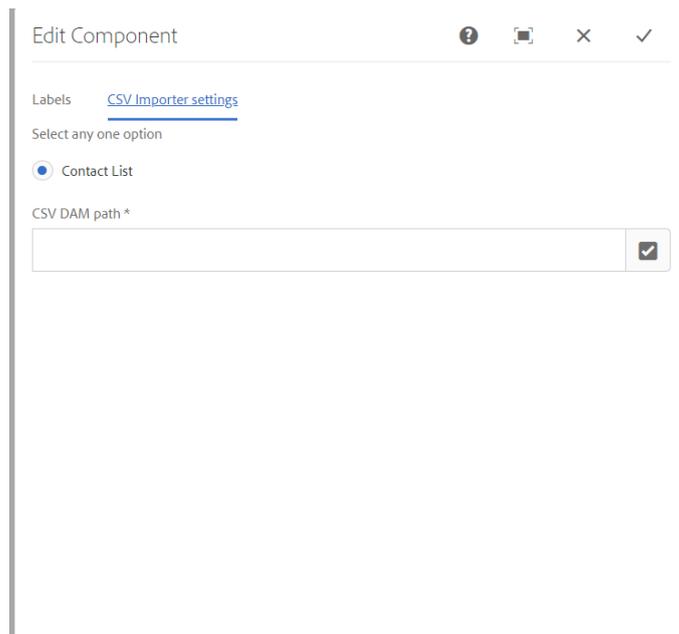
Once you open up the page add the CSV Importer component to the page



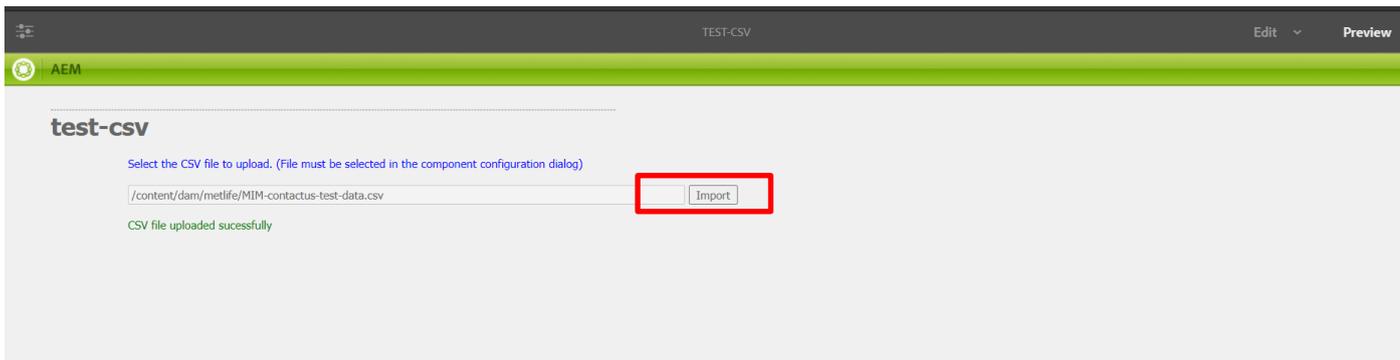
Once you have added the CSV importer component double click or click the edit icon to configure the component.



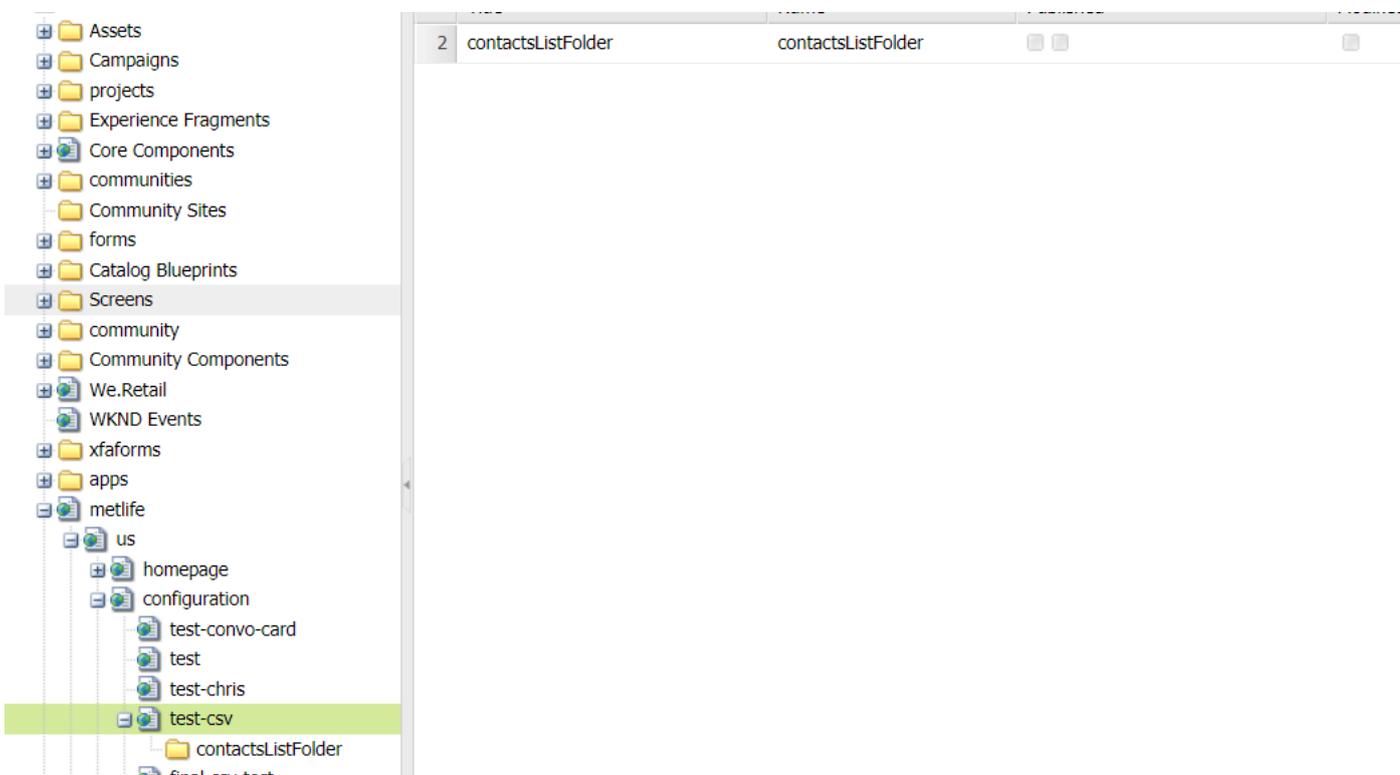
Most of the fields will be configured for you in the “Label” tab so go to the “CSV Importer Settings” tab and make sure Contact List is selected in the radio dial and choose the DAM path to where your CSV is that stores your contacts and click the check mark in the top right to save.



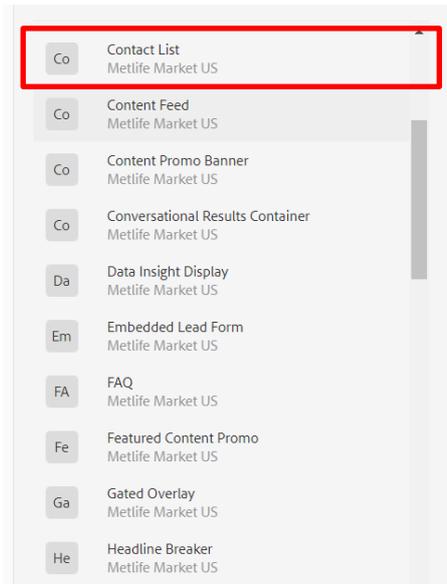
Next go to the Preview Tab and click the “import” button on the component to create the contacts needed for the component. You will receive a message of “CSV file uploaded Successfully” if successful if not then double check the csv file.



Make sure you publish the contactListFolder that is created under the node in the configuration folder to make sure the contacts are available on the publisher



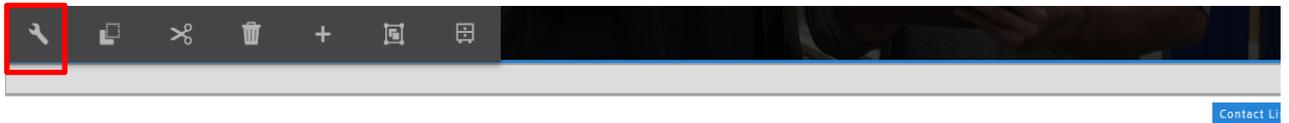
This component/feature is available in the sidekick and can be dragged onto any parsys in any standard template  
- From Sidekick, select market specific component group then “Contact List”



\*\*\*In order for this component to be useful you must set up a properly formatted CSV please \*\*\*\*\*

## 4 Component Dialog

1. Press edit to open the dialog and begin editing the component fields.

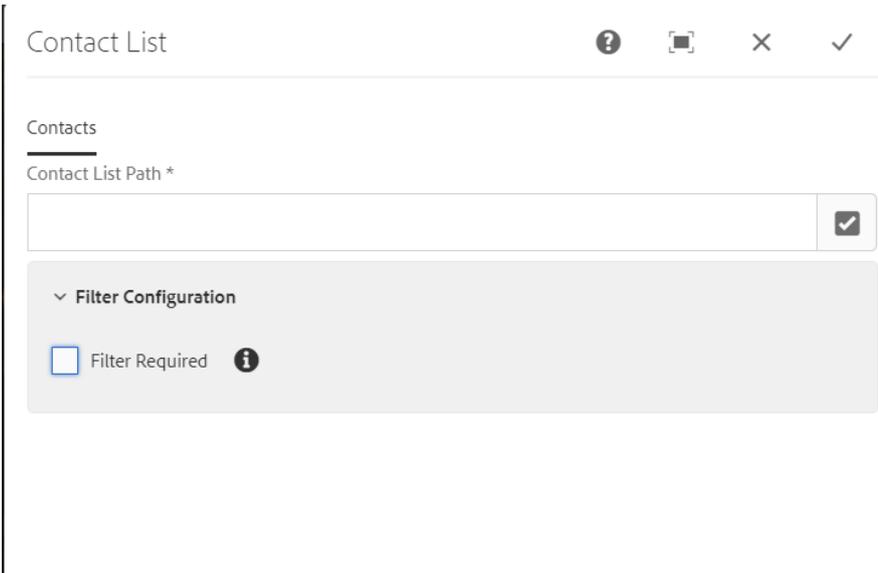


### Configuration

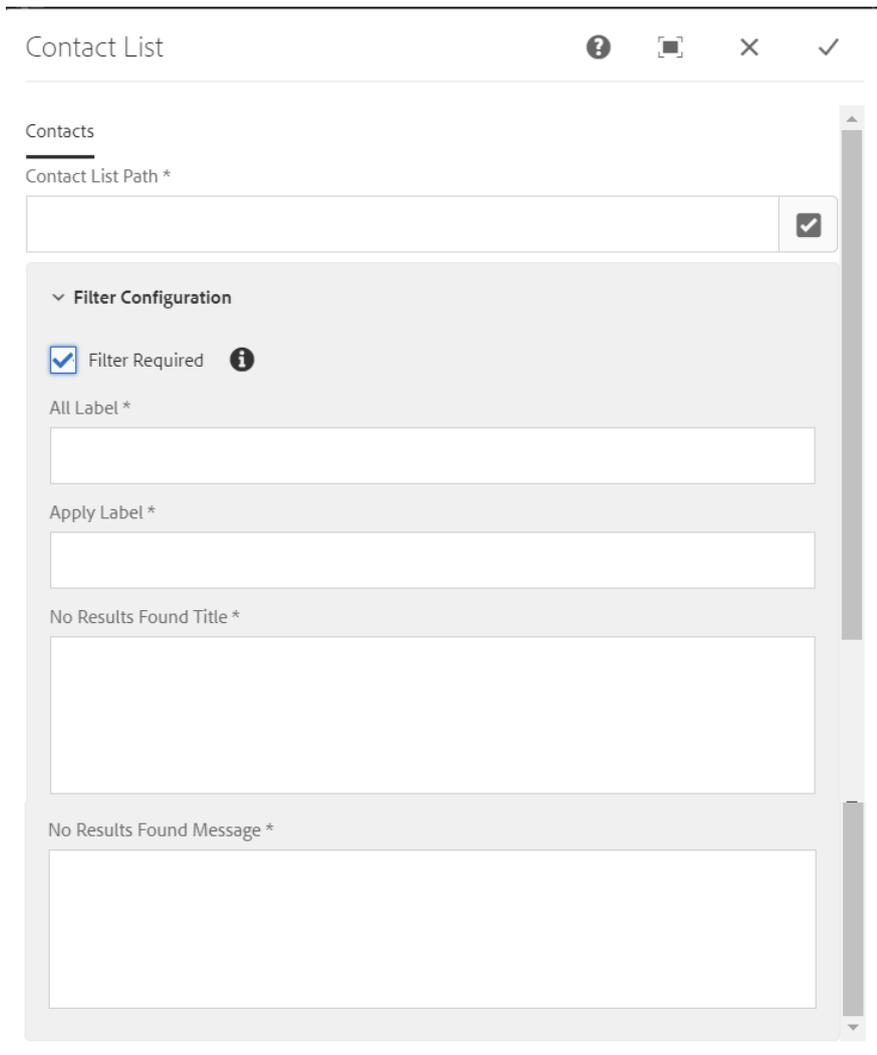
This Tab will contain the Contact List component configuration and content.

1. Contact List Path – Path to where you have done your CSV configuration
2. Filter Required – Toggle to enable or disable the filtering functionality for your contacts
3. All Label – label for the default option for the filters
4. Apply Label – label for the filtering button
5. No Results Found Title – title in case no results are found in filtering
6. No Results Found Message – message in case no results are found in filtering

### Dialog with Filter Disabled



**Dialog with filter enabled**



## Contact List no Filter

|  |  |   |
|--|--|---|
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| <p><b>Andrea De Anda</b><br/>Mortgage Originations<br/><br/>                 Paseo de Los Tamarindos No. 90,<br/>Torre I, Piso 11, Oficina B Col., Bosques de las<br/>Lomas, Cuajimalpa, C.P. 05120 Mexico, D.F.<br/><br/>  011-52-55-5950-9910<br/>  andrea.deanda@metlife.com.mx</p> | <p><b>Andrew Carey</b><br/>Mortgage Originator<br/><br/>                 6750 Poplar Avenue, Suite 109<br/>Germantown, TN 38138<br/><br/>  (904) 424-7207<br/>  andrew.carey@metlife.com</p> | <p> (213) 576-1888<br/>  angela.azizian@metlife.com</p>   |
| <p>Angus C. Campbell</p>   | <p>Annette Bannister</p>   | <p>Anthony DeVicaris</p>  |

## Contact List with Filter

| Agricultural Finance  | Institutional Investors   | Private Capital   | Real Estate          |
|---|---|---|----------------------|
| <p>Type (Filter1)<br/>All </p>  | <p>Location (Filter2)<br/>All </p>  | <p>Filter3<br/>All </p>   | <p> <b>APPLY</b></p> |
| <p><b>Amar Sohal</b><br/>Mortgage Originator<br/><br/>                 P.O. Box 3002<br/>Yuba City, CA 95992<br/><br/>  (530) 300-6284<br/>  amar.sohal@metlife.com</p> | <p><b>Andrew Carey</b><br/>Mortgage Originator<br/><br/>                 6750 Poplar Avenue, S<br/>Germantown, TN 381<br/><br/>  (904) 424-720<br/>  andrew.carey@metlife.com</p> | <div data-bbox="798 1232 1484 1680"> <p>Contact List</p> <p>Contacts</p> <p>Contact List Path *</p> <input type="text" value="/content/metlife/us/configuration/test-csv"/> <p>Filter Configuration</p> <p><input checked="" type="checkbox"/> Filter Required</p> <p>All Label *</p> <input type="text" value="All"/> <p>Apply Label *</p> <input type="text" value="Apply"/> <p>No Results Found Title *</p> <input type="text" value="No Results Found Title"/> <p>No Results Found Message *</p> <input type="text" value="No Results Found Message"/> </div> |                      |

## Contact List with Filter/ No Results Found

[Agricultural Finance](#)   Institutional Investors   Private Capital   Real Estate

Type (Filter1)   Location (Filter2)   Filter3

Food and Agribus...   Alabama   Arizona   **APPLY**

**No Results Title**   No Results Message

Contact List

Contact List Path\*

Filter Configuration

Filter Required

All Label\*

Apply Label\*

Apply

No Results Found Title\*

No Results Title

No Results Found Message\*

No Results Message

| Tab                      | Field Name             | Field Group   | Field Type | Validation        | Accepted values                         |
|--------------------------|------------------------|---------------|------------|-------------------|---|
| Configuration            | Contact List Path      | Configuration | Pathfield  | Mandatory         | Path to contacts configured by CSV list |
|                          | Filter Configuration   |               |            |                   |   |
|                          | Filter Required        | Configuration | Checkbox   | Mandatory         | On/off                                  |
|                          | All Label              | Configuration | Text field | Mandatory         | Alphanumeric Text                       |
|                          | Apply Label            | Configuration | Text Field | Mandatory         | Alphanumeric Text                       |
|                          | No Results Found Title | Configuration | Text Field | Mandatory         | Alphanumeric Text                       |
| No Results Found Message | Configuration          | Text Field    | Mandatory  | Alphanumeric Text |   |