

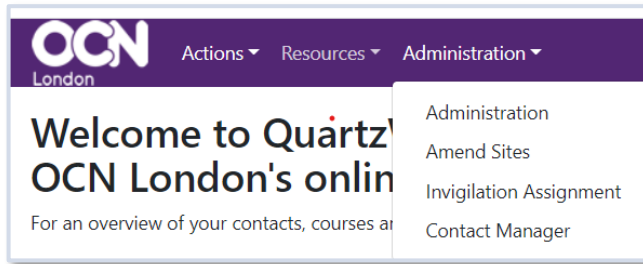
QuartzWeb Guide

Contact Manager on QuartzWeb

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The Contact Manager facility in QuartzWeb allows you to manage all the contacts that we hold for you as one of our OCN London Approved Centres.

1. Login to <https://quartz.ocnlondon.org.uk>.
2. Click on Administration and select Contact Manager from the menu.



3. A list of the contacts that we currently have on record for your centre will display.

Contact Manager

Please help us to ensure we have up-to-date contact info for all your admin, curriculum, quality and finance contacts.

You can re-order the contacts listed below by clicking on any of the headers in purple. Please click **Actions >> Modify this contact's details** to edit a contact or click **Add New Contact** for a new colleague.

If you require any assistance please contact enquiries@ocnlondon.org.uk.

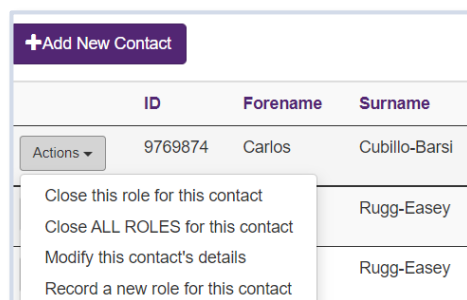
[+Add New Contact](#)

ID	Forename	Surname	Role	Job Title	Site	DDI Number	email	Until

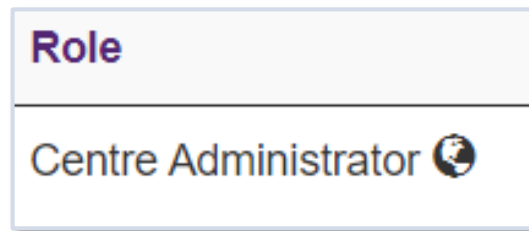
Administration Contacts and Centre Administrators will be able to do the following:

- Close an existing contact (this brings their role at your centre to an end as of that date).
- Modify the details of an existing contact (amend their name, contact details, job title or site location).
- Add new roles to an existing contact.
- Add new contacts.

These changes can be completed by clicking on the Actions tab against each contact.



A globe icon next to a contact indicates that they have a QuartzWeb account.



All fields on the Contact Manager screen are sortable, by clicking on the column headers in purple.

Closing a Contact

To close a contact, click on the Actions button against the contact and choose 'Close this Role for this Contact'. You will be asked to confirm if that is your required action. Once you confirm this will add a note to our Quartz database confirming who closed the contact and when. The contact will still be visible up to the day it has been closed but will no longer show on subsequent days. Confirmation that this is complete will show on the screen and will automatically clear after a few seconds.

If the contact holds more than one role and you wish to close all roles for a contact, please click on the Actions button against the contact and select 'Close ALL ROLES for this contact.'

Modifying a Contact

To modify the details for a contact, click on the Actions button against the contact and choose 'Modify this Contact's details'. The details for the contact will appear on screen and it will allow you to amend the details where relevant. Once completed, please click 'Modify'. Confirmation that this is complete will show on the screen and will automatically clear after a few seconds.

Adding a New Role to an Existing Contact

To assign a new role to an existing contact, click on the Actions button against the relevant contact and select 'Record a new role for this contact'. You can choose the required role from the drop down box that appears as well as the relevant Site. Please click 'Add Role' to confirm. Confirmation that this is complete will show on the screen and will automatically clear after a few seconds.

Adding a New Contact

To add a new contact, click the purple 'Add New Contact' button from the top of the screen. Please then complete the Contacts name, site address, telephone number, role, and email address. Once finished, please click 'Add'. Confirmation that this is complete will show on the screen and will automatically clear after a few seconds.

Important Notes

Please note that you cannot modify an existing contact's role, but you can close that role and add a new role to the contact.

If a contact already exists and you need to assign a new role to them, please add the role against their current record - you do not need to add the contact again.

Please be aware that only the roles that you are currently authorised to add show in the Roles field, for any other role amendments please email your OCN London Business Support Officer or contact us at enquiries@ocnlondon.org.uk

If you add a new contact and they require access to QuartzWeb please email your OCN London Business Support Officer or contact us at enquiries@ocnlondon.org.uk so that we can activate their account. Please detail the contacts full name when emailing.

Please do not hesitate to contact us for with any queries and we will be happy to help.



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