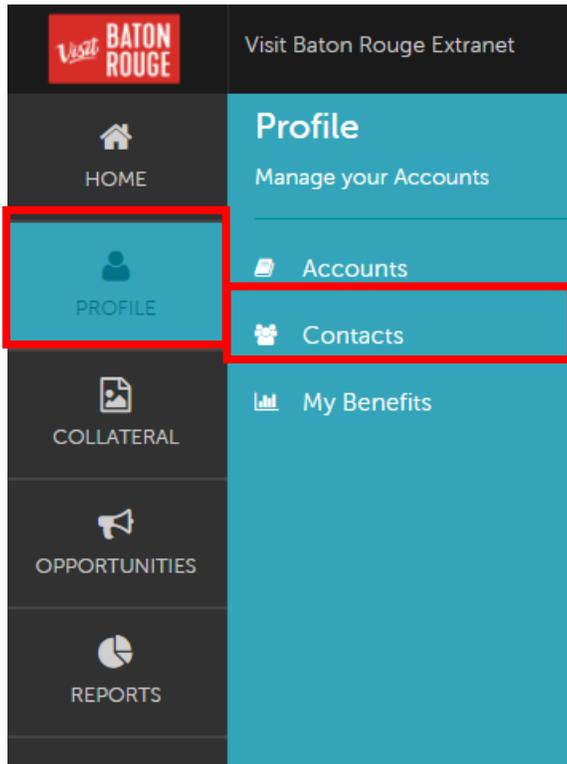




AN AUTHENTIC LOUISIANA EXPERIENCE

How To ... Update Contact(s)



The Profile Tab ...

★ **HOT TIP:** Always add your images / pictures first before adding another Listing, Promos/Specials or Calendar of Events

1) Click on the **Profile** tab > click on to **Contacts**

IMPORTANT NOTE: Not everyone has the permission enabled to update Contact(s). Please advise which contacts should have this permission granted.

Icon Keys:

To **edit** a contact, click 

To **clone / duplicate** a contact, click 

To **view**, a contact, click 

Contacts

Filters (0) Manage Filters

Account is one of: Contact Type is one of:

Page 1 of 4 Go to Page:

Actions	Full Name	Account	Title	Email	Contact Type
  	Paul Arrigo	Visit Baton Rouge	President & CEO	paul@visitbatonrouge.com	Primary
  	Paulina Tavera	Visit Baton Rouge	CRM Marketing Manager	paulina@visitbatonrouge.com	Primary

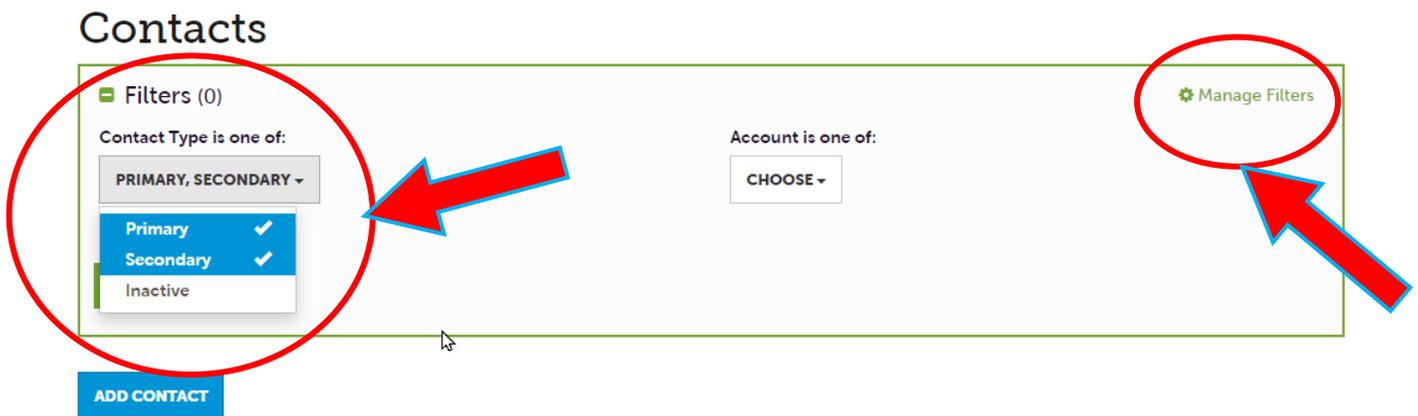
2) The list of Contact(s) from your Account will present below with the choice to **Edit, View or Duplicate / Copy an existing Contact.**



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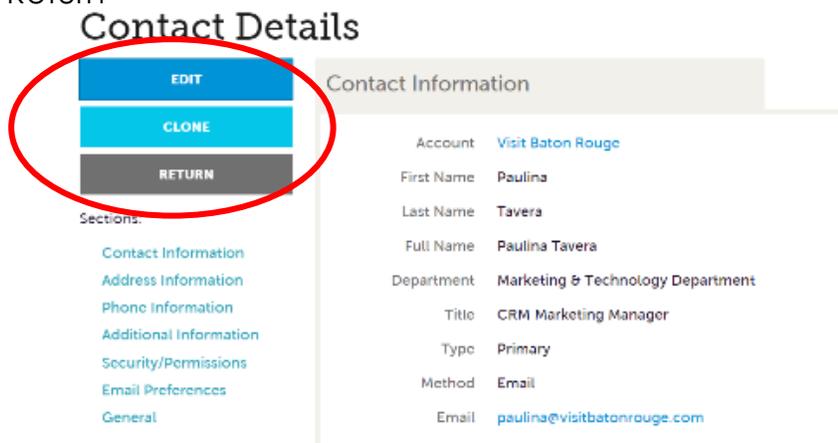
- To Add a new Contact, click on **ADD CONTACT**
- To Search for a specific contact or you would like to search which contacts are Primary | Secondary | Inactive. Click on the **Manage Filters** and a dropdown will appear for you to choose. You may also manage or search your contacts through **Manage Filters** on the top right of the box.

Note: If you would like to choose more than one type, use your Control key as you click on the types.



3) To Update a contact ... there are two (2) options A or B.

Option A) Click on the actual name > Contact Details > Displaying > Choose: Edit | Clone | Return



OR



Option B) Click on the  to edit > Update Contact

Update Contact

4) Sections

Contact Information - (*Required) Add / Update fields:

Account > **First Name** > **Last Name** > **Full Name** > **Department** > **Title** > **Contact Type** > **Preferred Contact Method: Email** | **Email** | **Send Email: YES**

Address Information - Click on the  to Add / Update the address information:

Physical > **Billing** > **Shipping**

Phone Information – Add / Update Fields:

Primary Phone > **Alternate Phone** > **Mobile Phone** > **Fax** > **Send Fax (YES or No)** > **Home Phone**

Additional Information – Add / Update:

Assistant (Name) > **Assistant (Phone/ Ext)** > **Gender (Male or Female)** > **Spouse (Name)** > **Children (Names)** > **Birthdate** (Dropdown for Month & Date only)



*The contact fields required are in **Red**.



Email Preferences – Add / Update Fields:

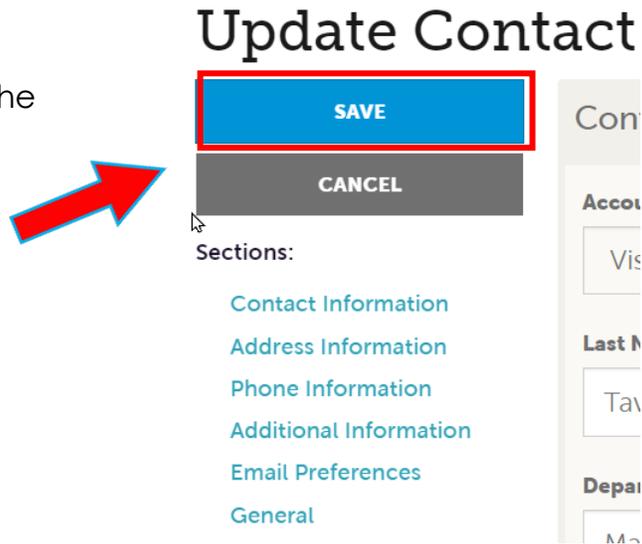
GDPR Privacy Policy (YES) > Red Stick Roundup and Events Calendar Newsletter > (YES or NO) > General Communications Newsletter & Emails (YES or NO)

General – Add / Update Fields:

Middle Initial (or Name) > Food Allergy > Contact Needs (Comments)

*The contact fields required are in Red.

5) Click on **SAVE** at the top left of the form to submit and save information.



For additional information, please email Paulina Tavera at paulina@visitbatonrouge.com

