Visit BATON ROUGE

AN AUTHENTIC LOUISIANA EXPERIENCE

How To... Update Contacts

Visit Baton Rouge Extranet

Profile
Manage your Accounts

- 📇 Accounts
- 👥 Contacts
- 📊 My Benefits
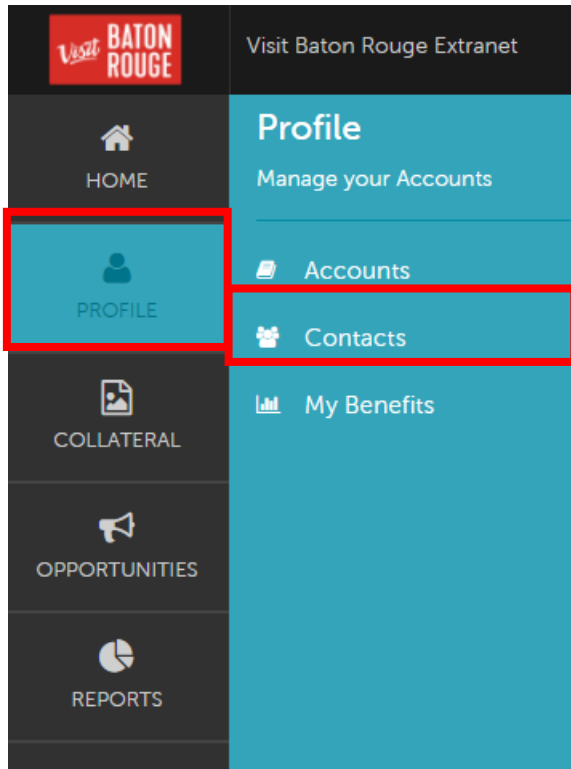
The Profile Tab

⭐ **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:
CHOOSE ▾	CHOOSE ▾

APPLY FILTERS

ADD CONTACT   ◀ Page 1 of 4 ▶   Go to Page: 1 ▶

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.**

DESTINATION MARKETING
ACCREDITED ORGANIZATION
ACCREDITATION PROGRAM

AN AUTHENTIC LOUISIANA EXPERIENCE

1

- 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 **Contact Type is one of: CHOOSE ▾** 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.
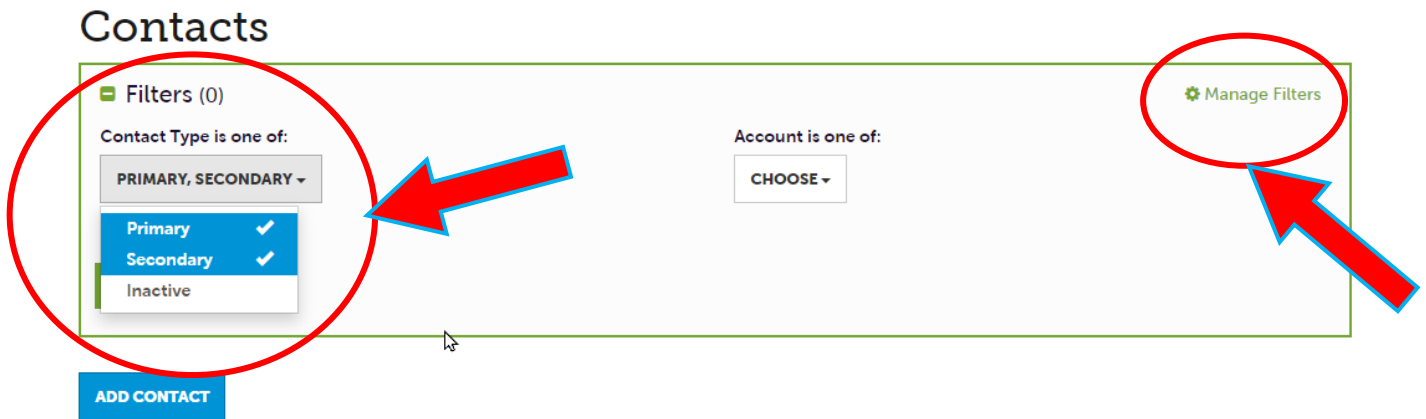
Contacts

3) To *Update* a contact ... <u>there are two (2) options A or B.</u>

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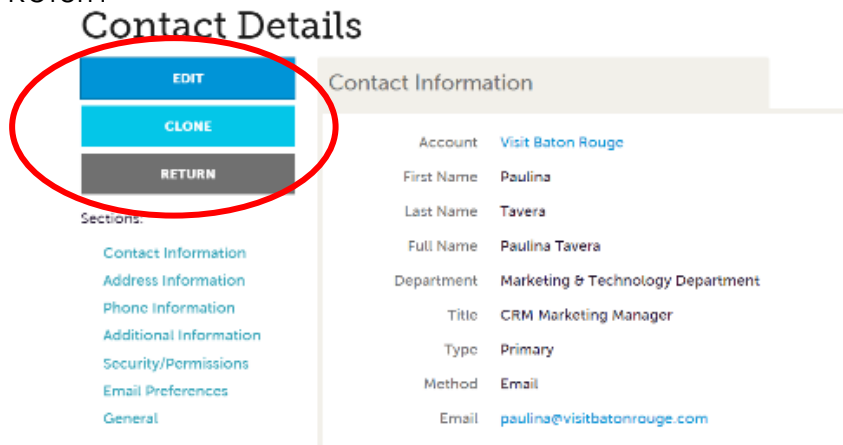
OR

Option B) Click on the ✏️ **to edit** > Update Contact

Update Contact

SAVE

CANCEL

Sections:

Contact Information
Address Information
Phone Information
Additional Information
Email Preferences
General

Contact Information

Account: ◀Required

Visit Baton Rouge

Last Name: ◀Required

Tavera

Department:

Marketing & Technology Department

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) **> Birthday** (Dropdown for Month & Date only)

The contact fields required are in **Red**.
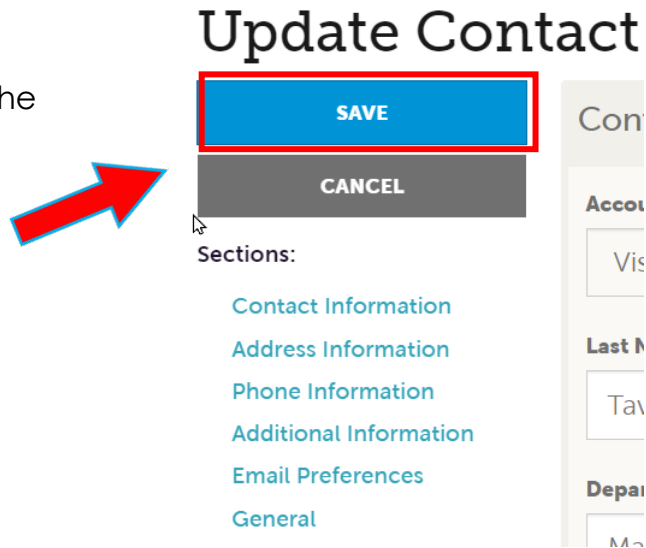
Email Preferences – Add / Update Fields:

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.

Update Contact

SAVE

CANCEL

Sections:

Contact Information
Address Information
Phone Information
Additional Information
Email Preferences
General

Accou

Vis

Last N

Tav

Depar

Ma

For additional information, please email
Bridget Gaffney at bridget@visitbatonrouge.com