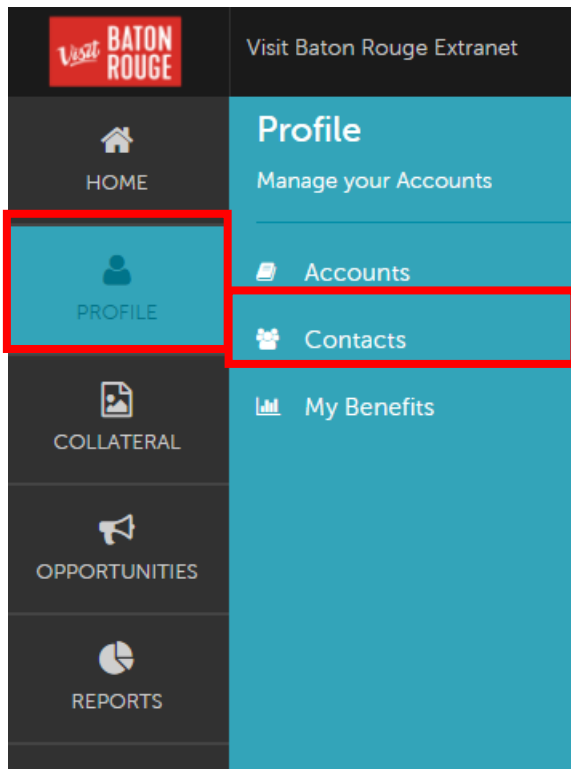


# How To... Update Contacts



## 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:

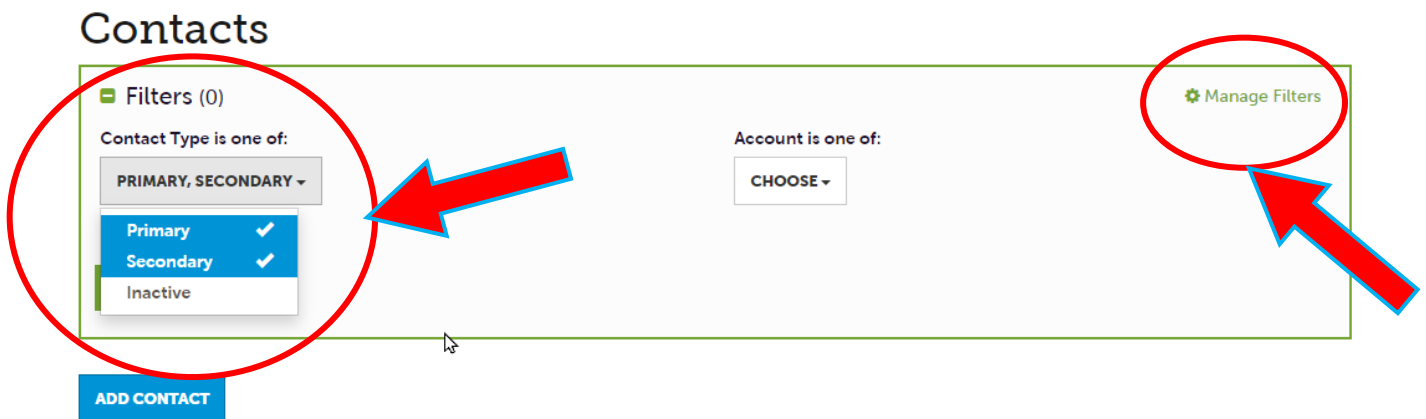
Actions	Full Name	Account	Title	Email	Contact Type
  	Paul Arrigo	Visit Baton Rouge	President & CEO	paul@visitbatonrouge.com	Primary
  	Paulina Tavera	Visit Baton Rouge	CRM Marketing Manager	paulina@visitbatonrouge.com	Primary

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



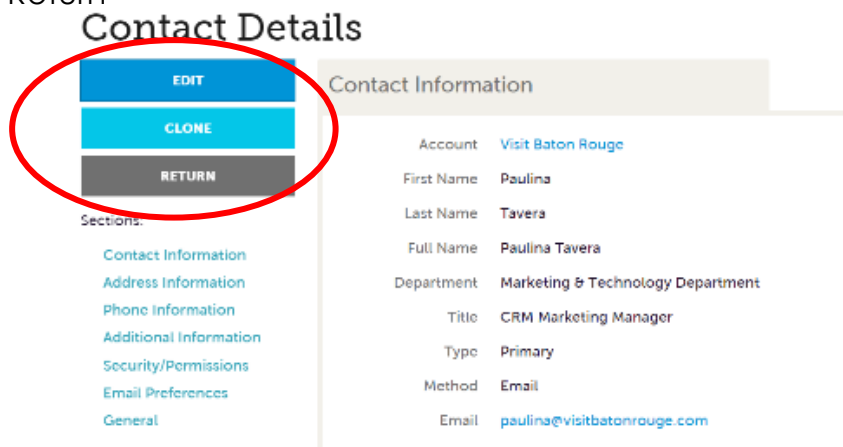
- To Add a new Contact, click on **ADD CONTACT**
- To Search for a specific contact or you would like to search which contacts are Primary | Secondary | Inactive. Click on the **Manage Filters** and a dropdown will appear for you to choose. You may also manage or search your contacts through **Manage 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)** > **Birthday (Dropdown for Month & Date only)**

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





Email Preferences – Add / Update Fields:

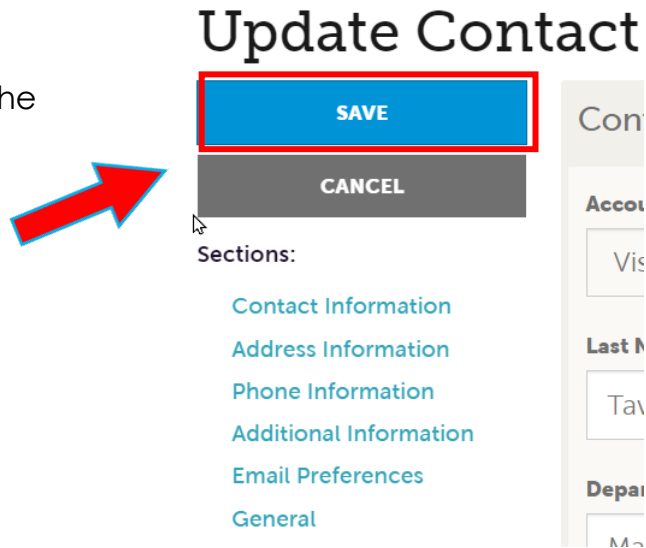
**GDPR Privacy Policy (YES) > Red Stick Roundup and Events Calendar Newsletter > (YES or NO) > General Communications Newsletter & Emails (YES or NO)**

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.



For additional information, please email Fallon Gerald Tullier at [fallon@visitbatonrouge.com](mailto:fallon@visitbatonrouge.com)

