



Extranet Instructions Updating Contacts

<https://fortcollinsco.extranet.simpleviewcrm.com/login/#/login>

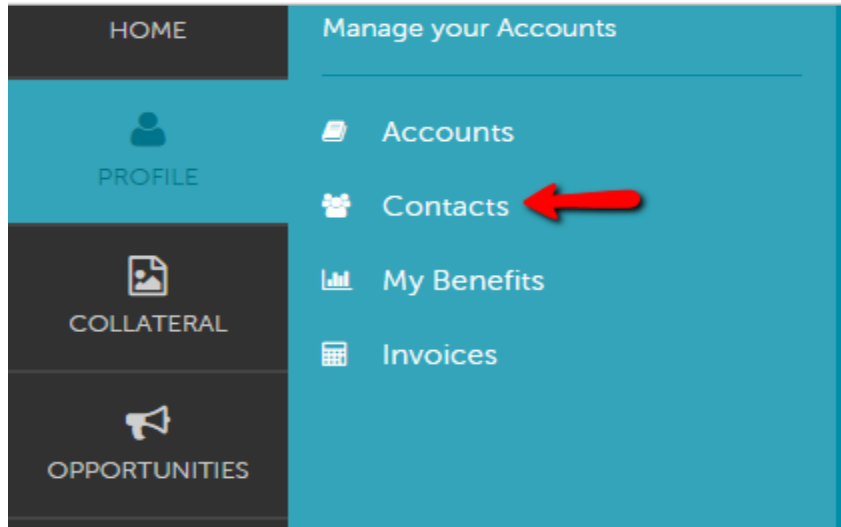
Viewing Your Partner Record

Depending on your access levels, there are various items that can be viewed under your Partner Profile:

1. Contacts

Contacts:

1. To update your contact records, click the Profile link and select Contacts. Once in the contact screen select the one you want to edit and click the pencil icon to the left of their name.



2. To add a new Contact, click the "Add Contact" button.

The image shows a table of contacts with the following columns: Actions, Full Name, Account, Title, Email, and Contact Type. There are four rows of contact data. Annotations with red boxes and arrows point to the "ADD CONTACT" button, the "View contact details" icon, the "Clone contact" icon, and the "Edit contact" icon.

Actions	Full Name	Account	Title	Email	Contact Type
	Brent Box	VISIT DENVER, The Convention & Visitors Bureau	IT Director	bbox@visitdenver.com	Secondary
	Ed Gerrity	VISIT DENVER, The Convention & Visitors Bureau	Partnership Sales Manager	emg3rd@aol.com	Secondary
	Phil Waneka	VISIT DENVER, The Convention & Visitors Bureau	Partnership Data & Systems Coordinator	bbates@visitdenver.com	Inactive
	Phil Waneka	VISIT DENVER, The Convention & Visitors Bureau	Partnership Sales Manager	cwaneka@visitdenver.com	Inactive

Please note: If a staff member leaves and a new one arrives, please clone the old contact. Change the account information as necessary and make the old contact inactive. You can do this by changing the "Contact Type" to Inactive. Or you can simply add a new person using the "Add New Contact" button.

Update Contact

The image shows the "Update Contact" form. It has a "SAVE" button and a "CANCEL" button. The form is divided into sections: Contact Information, Address Information, and Phone Information. The "Contact Information" section is currently active and contains the following fields:

- Account: VISIT DENVER, The Convention & Visitors Bureau
- First Name: Phil
- Last Name: Waneka
- Full Name: Phil Waneka
- Department: (empty)
- Title: (empty)
- Contact Type: Secondary (dropdown menu)
- Preferred Contact Method: --Choose One-- (dropdown menu)
- Send Email: YES (radio button selected)

