Contacts for DMO's/Parent Accounts
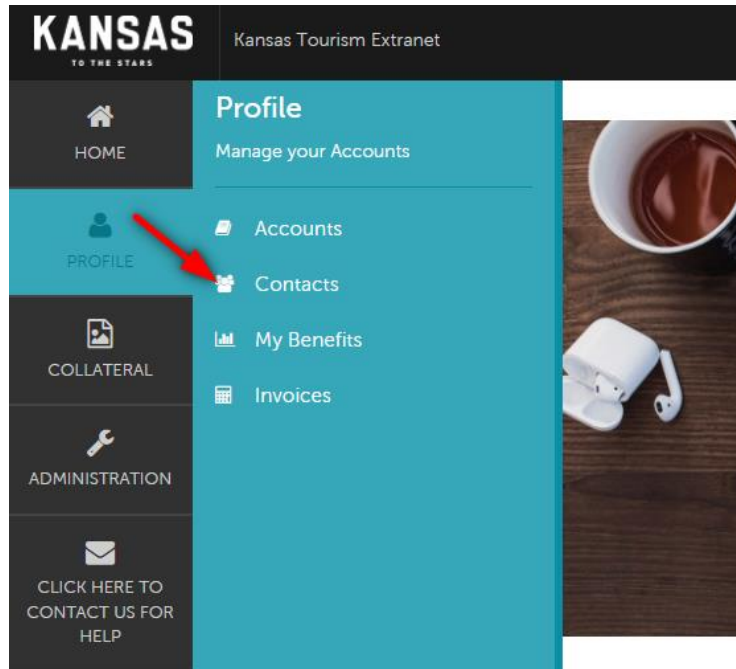
Click here to watch the tutorial video.

You may easily edit, clone and add new contacts for your account or any of your Child Accounts. Contacts are housed in the "Contacts" tab under "Profile."

To edit or add contacts to one of your Child Accounts, choose the child account from the filter drop box and click the pencil icon to edit or select the correct account from dropdown menu in the account section when adding a contact.

- To sort the contacts in view, select from the filters listed in the filter box at the top of the page.
- To add a new contact, click Add New Contact (left side of screen).
- To edit an existing contact, click the pencil icon while viewing the Contacts or click Edit while viewing the contact detail page. When editing a contact, the attached account name cannot be edited.
- To clone an existing contact, click the clone icon while viewing the Contacts or click Clone while viewing the contact detail page. When cloning a contact, the contact name can be changed but the account name cannot.
- You do not have the ability to delete contacts. If you have a contact that needs inactivated, please edit the contact and select **Inactive** from the dropdown list under "Contact Type" and then click "Save".
- You may view "Contact Details" by clicking on the name of an individual contact.

Adding a New Contact

You can easily add new staff members through the Extranet with the following steps:

1. Go to the "Contact" tab and click "Add Contact." The New Contact Form will display with the following fields (required items are marked).
    a. Account – Select this field in order to place the contact with the right account.
    b. First Name/Last Name – Enter the contact's first and last name. Once entered, the First/Last Name fields will automatically populate the required Full Name field for you.
    c. Full Name – Enter the contact's full name in this field if the system has not already populated it from the First/Last name field.
    d. Department – Enter the contact's department, if available.
    e. Title – Enter the title of the contact, if available.
    f. Contact Type – Select the contact type from the dropdown list. **DO NOT** select inactive unless a contact is being edited to be inactive.
    g. Preferred Method – Select the contact's preferred method of contact.
    h. E-mail – Please enter the contact's e-mail address.
    i. Physical, Billing, Shipping Addresses – This is auto-populated by the information in the Account Detail. If needed, you can update any of this information.
    j. Primary, cell, Home, Alternate, and Fax numbers – Enter all available numbers.
    k. Additional Information: This section can be included and allows us to better target contacts for tourism information that would be related to them.
    l. General: Select yes or no if you would like the contact to receive our weekly e-newsletter called Travel Talk.

Once all required fields are complete, click "Save" to save the new contact or click "Cancel" to cancel the contact addition.