

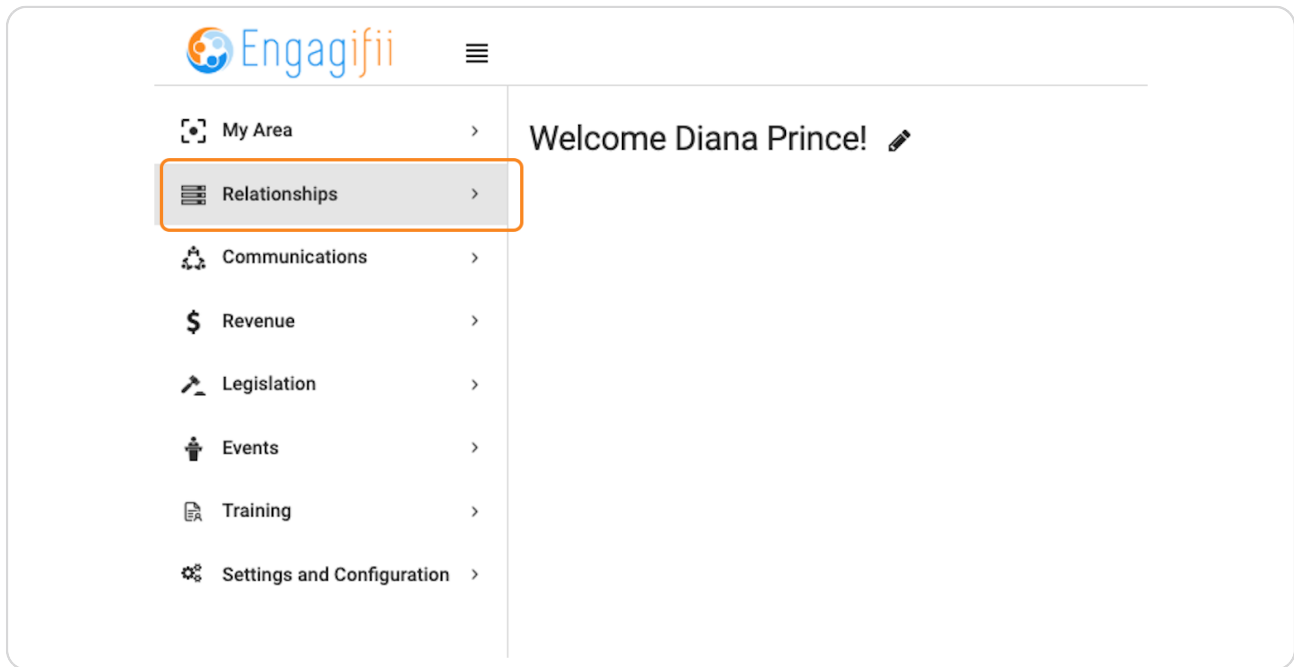
Adding or editing Key Contacts

12 Steps [View most recent version](#) 

| Created by | Creation Date | Last Updated |
|----------------|---------------|--------------|
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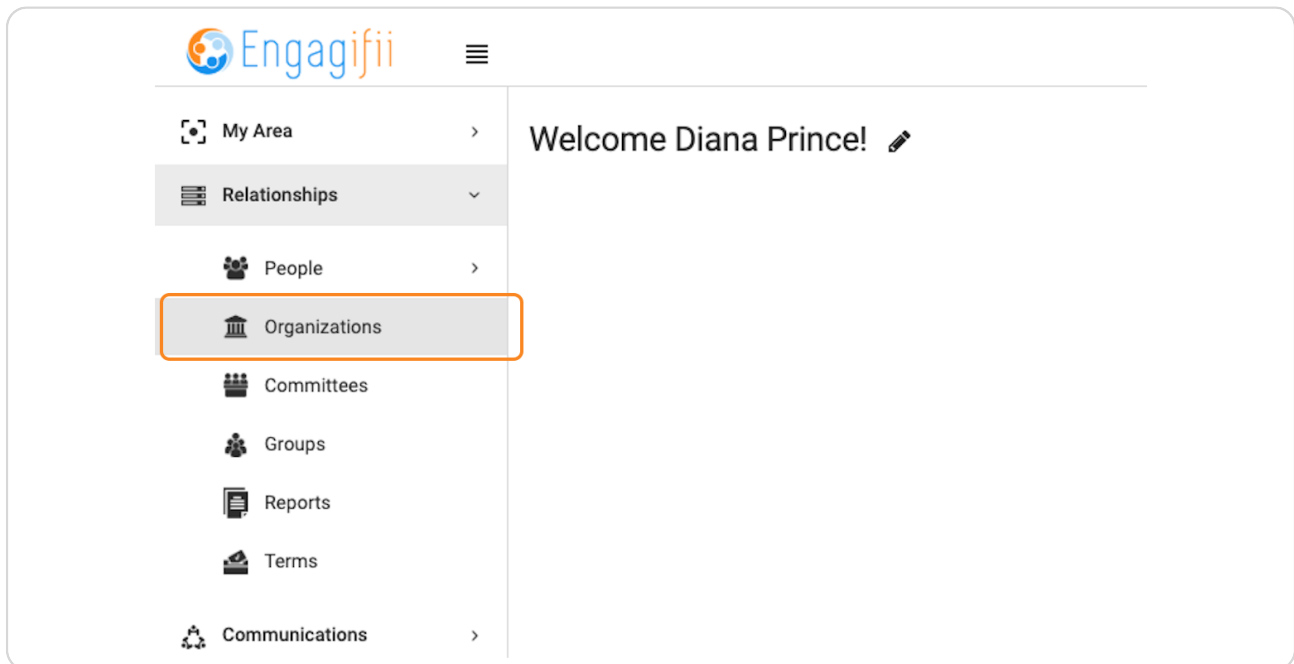
STEP 1

Click on Relationships



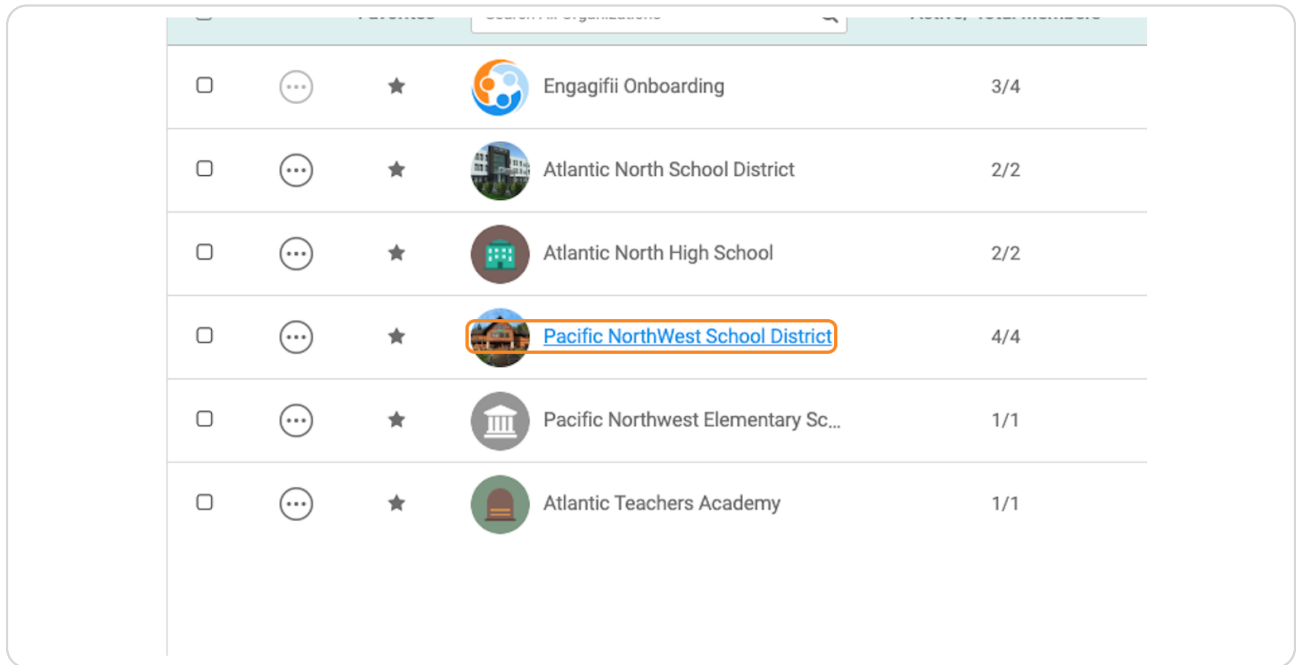
STEP 2

Click on Organizations



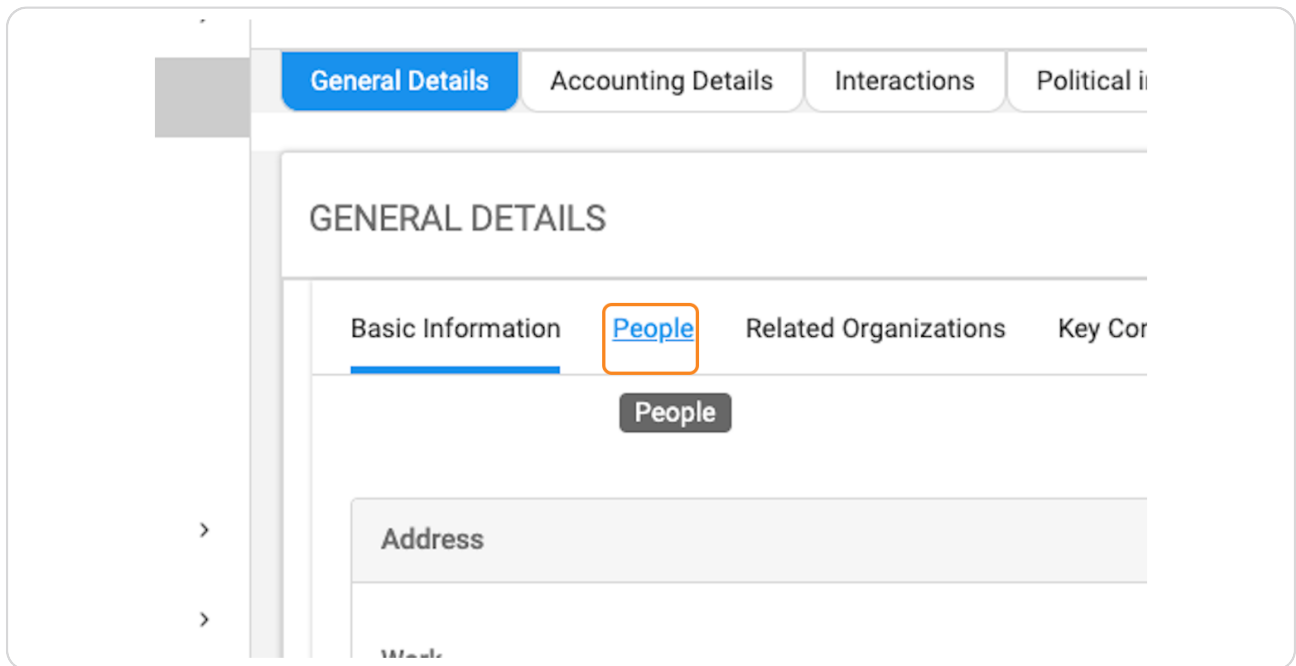
STEP 3

Click on the organization you wish to update



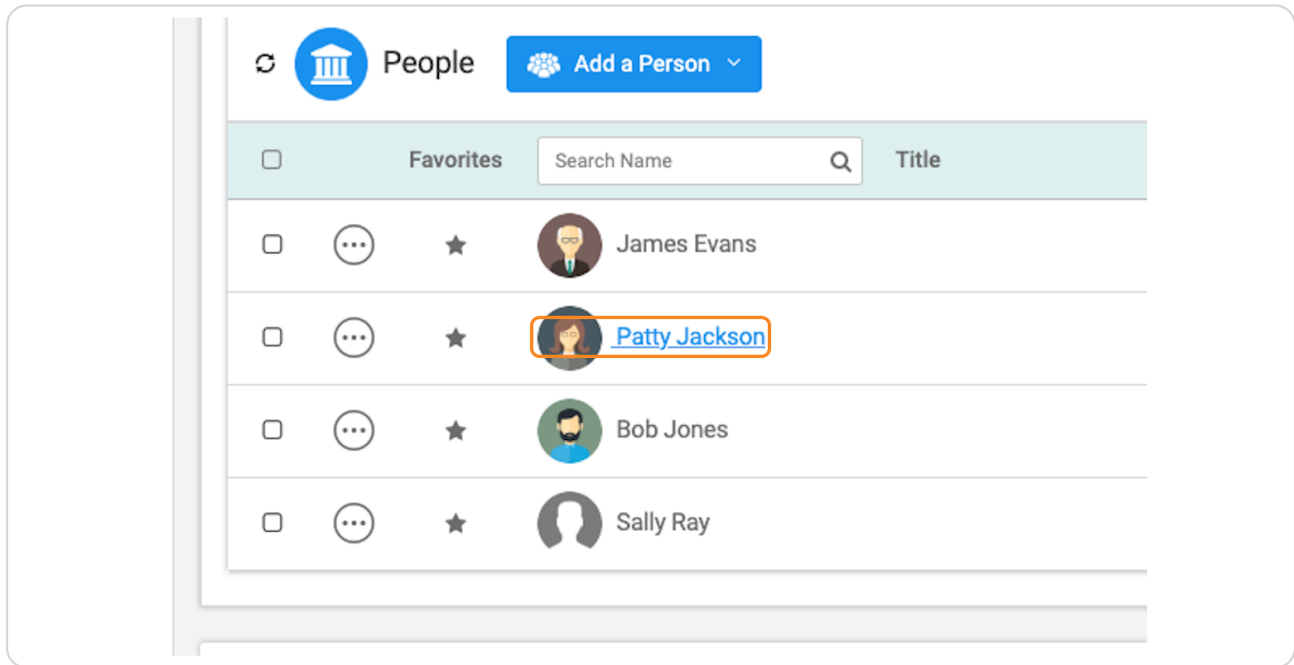
STEP 4

Click on People



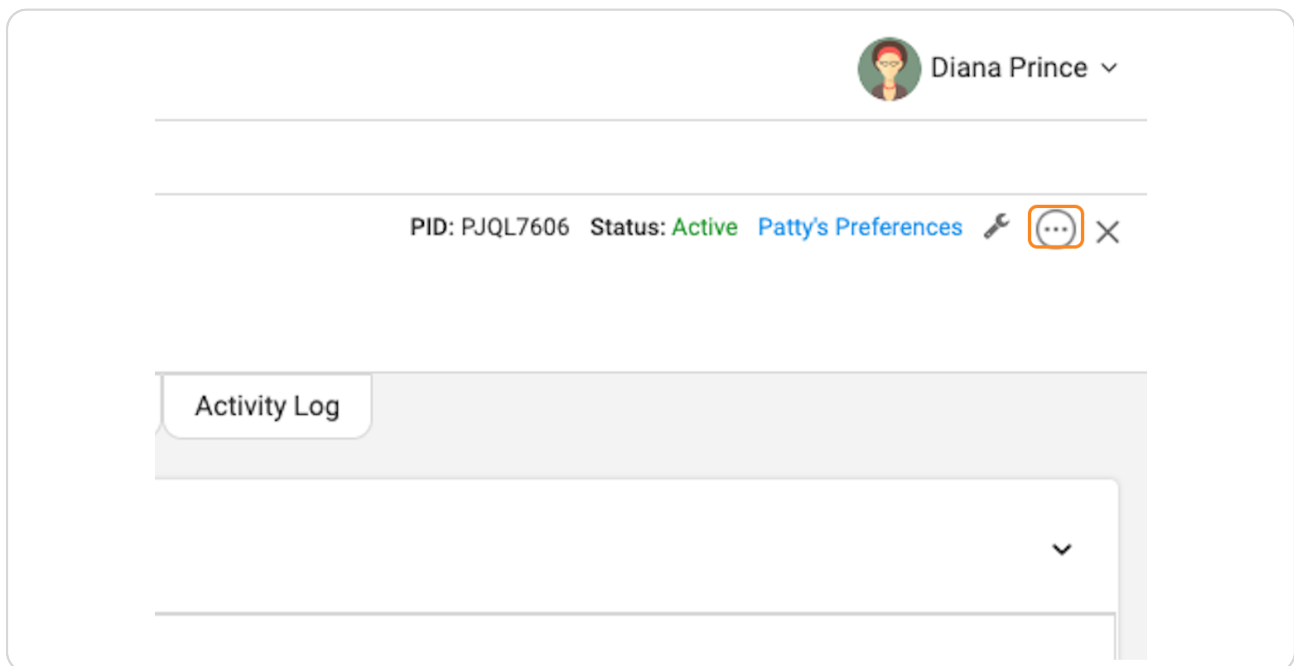
STEP 5

Click on the person you wish to make the key contact



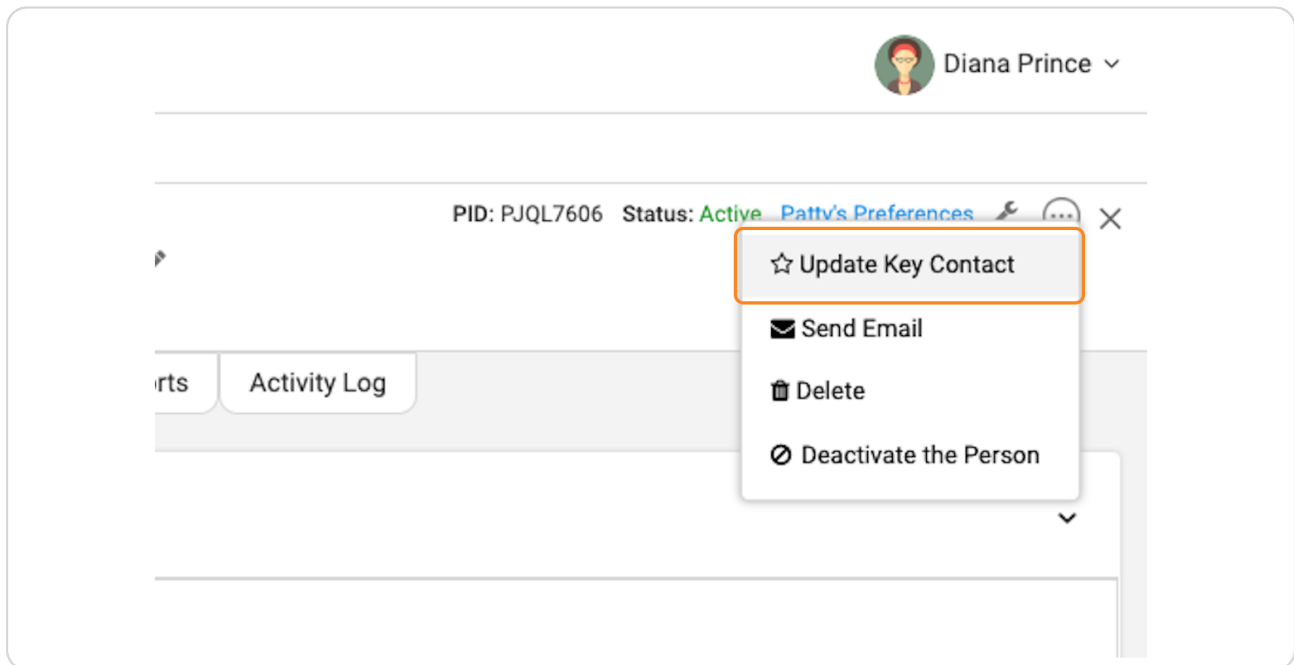
STEP 6

Click on the three dots



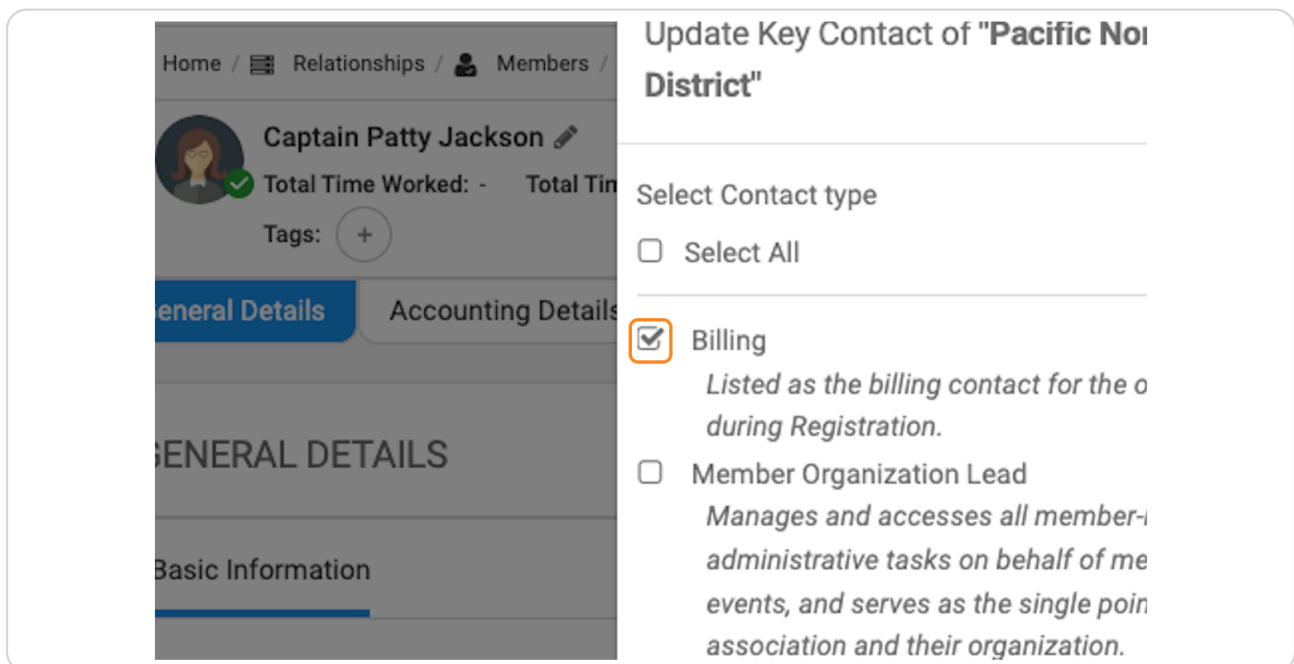
STEP 7

Click on Update Key Contact



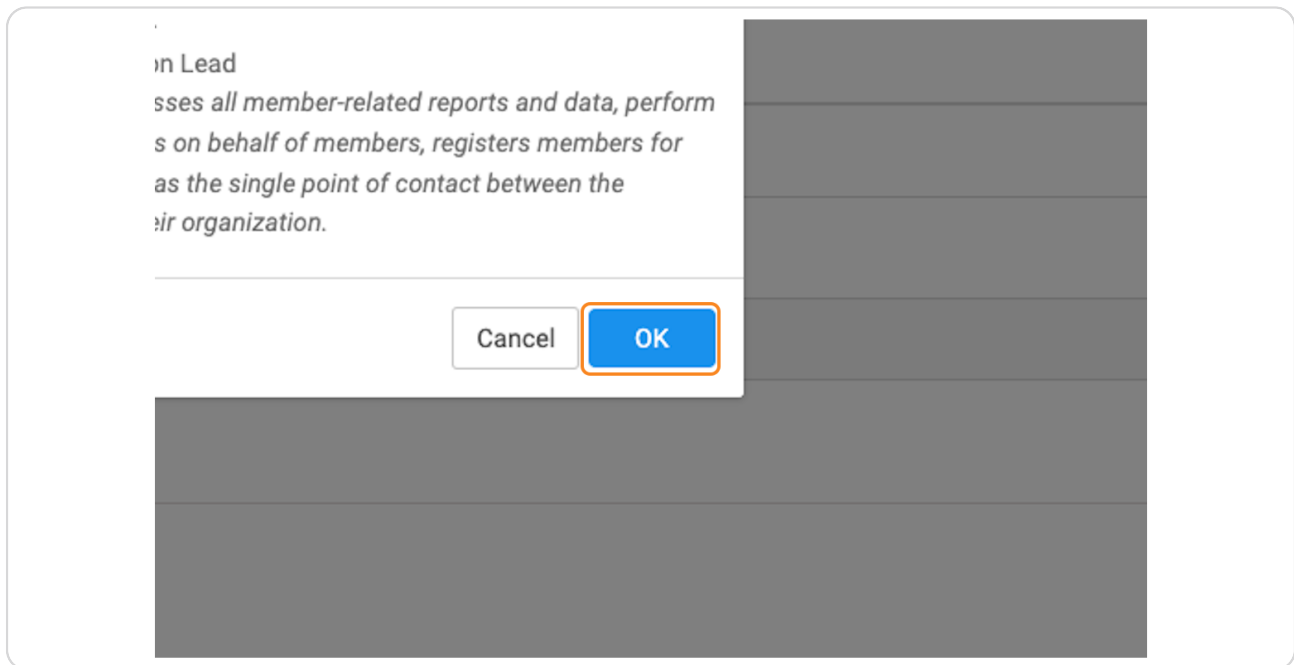
STEP 8

Check the box or boxes you wish to enable



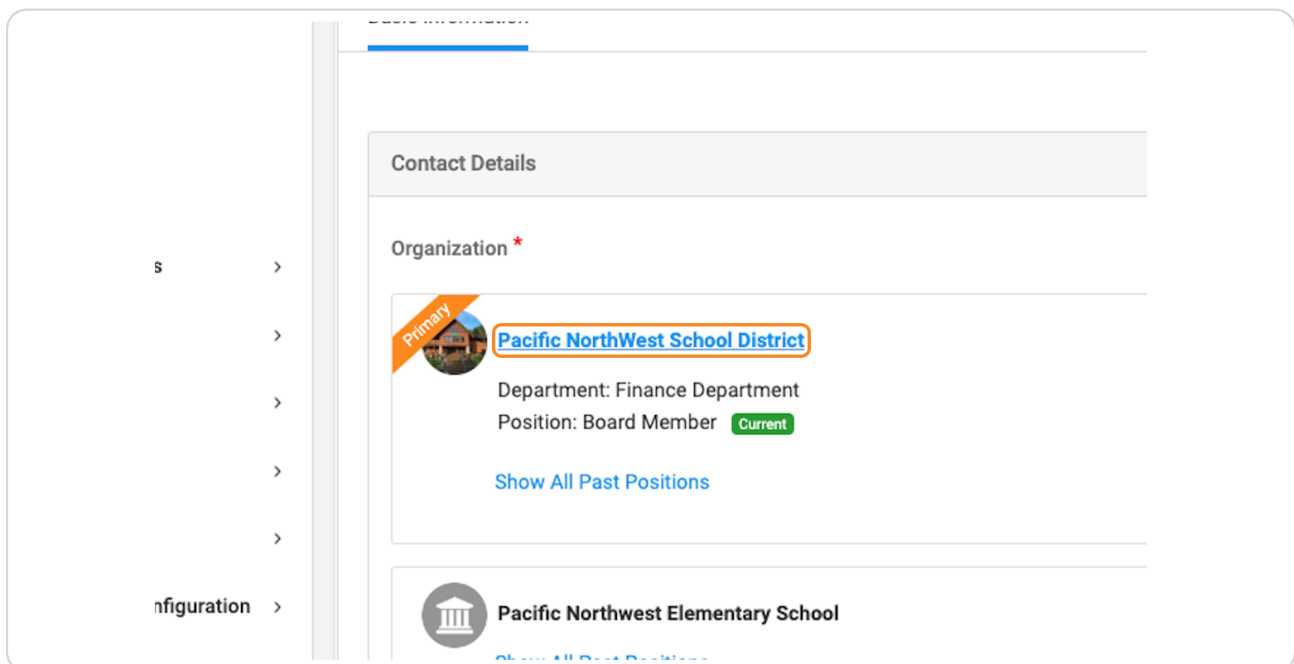
STEP 9

Click on OK



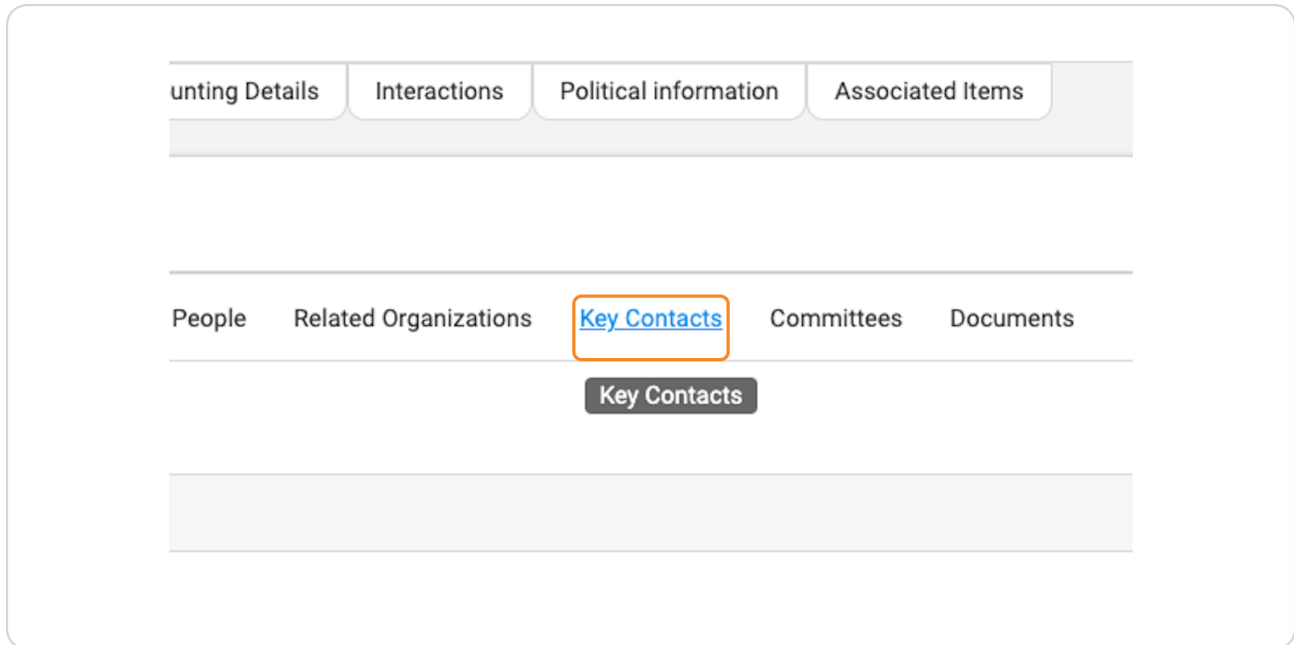
STEP 10

Click back on the organization



STEP 11

Click on Key Contacts



STEP 12

And you will see the individual listed as a key contact and you can scroll over to see the contact type.

