Adding or editing Key Contacts

12 Steps <u>View most recent version</u>

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Click on Relationships

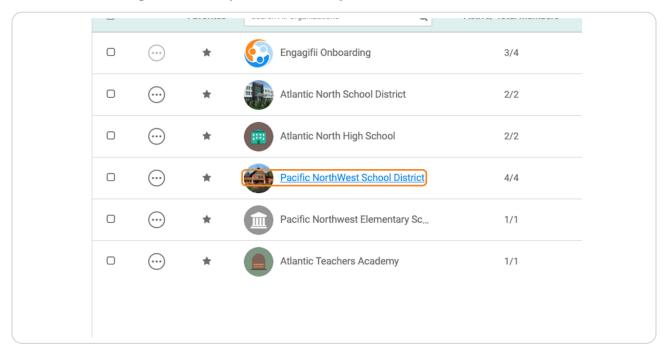
| 6 | Engagifii | ■ | |
|------------|----------------------------|---|-------------------------|
| 3 | My Area | > | Welcome Diana Prince! 🖋 |
| | Relationships | > | |
| 4.3 4.3 | Communications | > | |
| \$ | Revenue | > | |
| 2 | Legislation | > | |
| Ť | Events | > | |
| R | Training | > | |
| ¢° | Settings and Configuration | > | |
| | | | |

STEP 2

Click on Organizations

| 🚱 Engagifii | ≣ | | |
|------------------|-----------------|------------------------|--|
| [•] My Area | [,] We | elcome Diana Prince! 🕜 | |
| Relationships | ~ | | |
| People People | > | | |
| 🟛 Organizations | | | |
| Committees | | | |
| 🎄 Groups | | | |
| Reports | | | |
| 📤 Terms | | | |
| ሷ Communications | > | | |





Click on the organization you wish to update

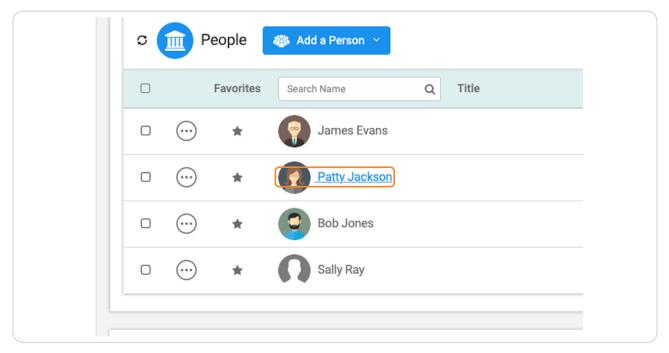
STEP 4

Click on People

| | General Details Accounting Details Interactions Political in |
|---|--|
| | GENERAL DETAILS |
| | Basic Information People Related Organizations Key Cor People |
| > | Address |
| > | 14/amly |



Click on the person you wish to make the key contact



STEP 6

Click on the three dots

| | | | V | na Prince 🗸 |
|--------------|---------------|----------------|---------------------|-------------|
| | PID: PJQL7606 | Status: Active | Patty's Preferences | ≁ [] × |
| Activity Log | | | | |
| | | | | ~ |

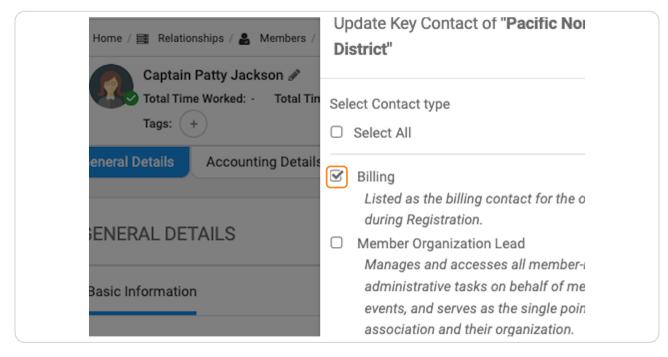


Click on Update Key Contact

| | PID: PJQL7606 Status: A | Active Patty's Preferences 🖌 📖 🗙 |
|------------------|-------------------------|----------------------------------|
| ¢ | | ☆ Update Key Contact |
| | | Send Email |
| rts Activity Log | | 🛍 Delete |
| | | Ø Deactivate the Person |

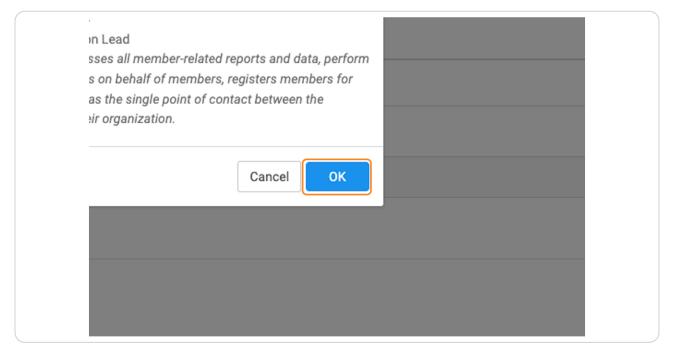
STEP 8

Check the box or boxes you wish to enable





Click on OK



STEP 10

Click back on the organization

| | | Contact Details | |
|-------------|---|-------------------------------------|--|
| | | | |
| | | Organization * | |
| S | > | | |
| | | | |
| | > | Pacific NorthWest School District | |
| | > | Department: Finance Department | |
| | · | Position: Board Member Current | |
| | > | | |
| | · | Show All Past Positions | |
| | > | | |
| | | | |
| nfiguration | > | Pacific Northwest Elementary School | |
| | | | |
| | | ol | |



Click on Key Contacts

| People Related Org | anizations <u>Key Conta</u> | cts Committees | Documents |
|--------------------|-----------------------------|----------------|-----------|
| | Key Con | tacts | |
| | | | |

STEP 12

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

| 🚱 Engagifii | ≡ | | 🕥 Diana Prince 🗸 | | | |
|---|---|--|------------------|--|--|--|
| [•] My Area | > | # Henre / III: Relationships / 1 Al Organizations / 1 Organization Detail * Assa Pacific NorthWest School District * | € ≯ × | | | |
| Relationships | ~ | Status: Active Organization Type: Organization Tag(s): | | | | |
| People People | > | | | | | |
| Organizations | | General Details Accounting Details Interactions Political information Associated Items | | | | |
| 🛗 Committees | | GENERAL DETAILS ~ | | | | |
| 🎄 Groups | | | | | | |
| Reports | | Basic Information People Related Organizations Key Contacts Committees Documents | | | | |
| 💁 Terms | | Key Contacts | | | | |
| 🛕 Communications | > | Current Position Current Department Status Email Phone Number | Contact Type | | | |
| \$ Revenue | > | Board Member Finance Department Active pattyjackson@yopmail.com 4045559999 | Billing | | | |
| A Legislation | > | | | | | |
| 🛉 Events | > | ACCOUNTING DETAILS | > | | | |
| 🖹 Training | ` | | | | | |
| O [®] Settings and Configuration | • | ASSOCIATED ITEMS | | | | |
| | | | | | | |
| | | INTERACTION DETAILS | > | | | |
| | | | | | | |
| | | POLITICAL INFORMATION | > | | | |
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