Adding or editing Key Contacts

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

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Click on Relationships

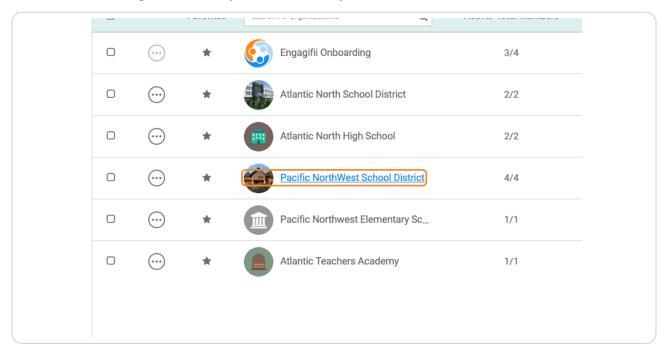
6	Engagifii	■	
3	My Area	>	Welcome Diana Prince! 🖋
	Relationships	>	
4.3 4.3	Communications	>	
\$	Revenue	>	
2	Legislation	>	
Ť	Events	>	
R	Training	>	
¢°	Settings and Configuration	>	

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

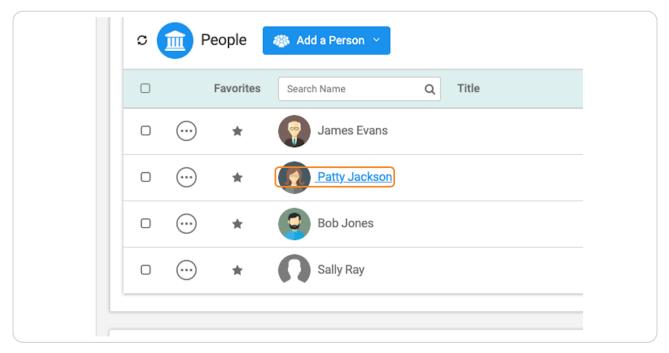
STEP 4

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				
				~

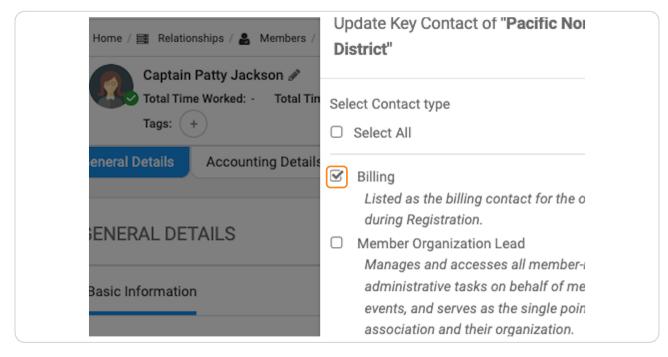


Click on Update Key Contact

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

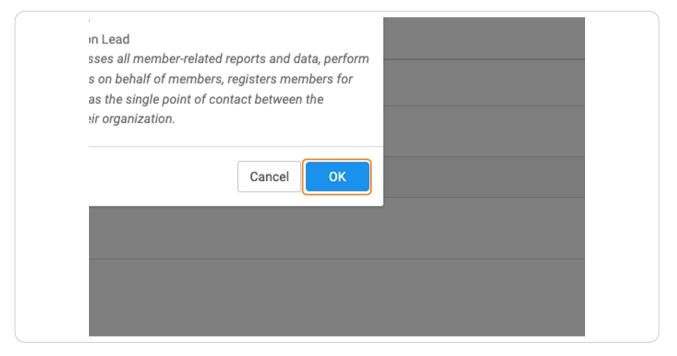
STEP 8

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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