

# Contact Manager Quick Guide



Search... Search

Home My Membership Contact Management Communities

Contact Management

Export: CSV Role Definitions Create a Call

Create & Assign

MEMBER ROLES UNASSIGNED MEMBER ROLES CONTACTS

Actions	Last name	First name	Member	Role	Type
	Search	Search	All	All	All
	Marino	Luz	Voting Member 1	Affiliate Disclosure Signer	Primary
	O'Brien	Seo	Voting Member 1	Affiliate Disclosure Signer	Alternate

Create and assign contacts with associated roles.

Search by first or last name.

Edit or delete role assignments.

To export the data, select the **Export: CSV** link on the Member Roles, Unassigned Member Roles or Contacts tab.

Select **Role Definitions** for descriptions of roles.

Select the **Unassigned Member Roles** tab to view roles that haven't been assigned.

Create & Assign

MEMBER ROLES UNASSIGNED MEMBER ROLES CONTACTS

Number	Role	Type
Voting Member 5	Affiliate Disclosure Signer *	Alternate
Voting Member 1	Authorized Representative	
Voting Member 5	Officer	Alternate
Voting Member 5	Information Technology *	Primary
Voting Member 5	Officer Certification Form *	Alternate
Voting Member 5	Officer of the Company *	Primary

Select the **Contacts** tab to view all contacts.

Edit contact information or delete all roles for contact.

Contacts that do not have a delete button are designated Contact Managers, Officers, Authorized Reps, or Maintenance Managers. See the Membership Management Community tools page for information on removing contacts from these rolls.

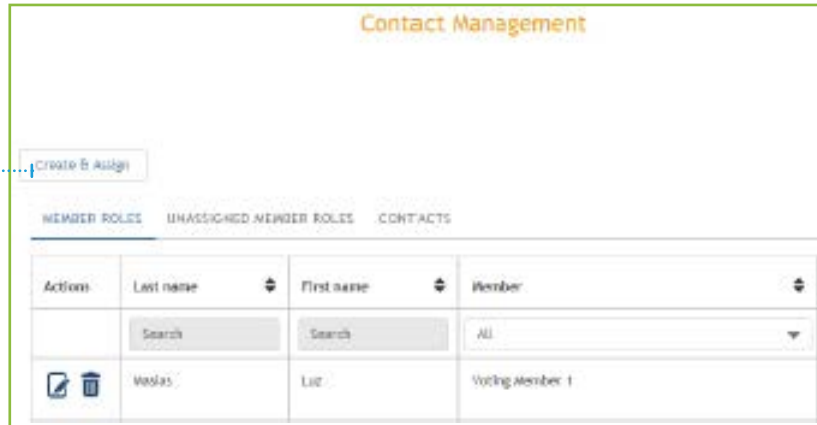
Create & Assign

MEMBER ROLES UNASSIGNED MEMBER ROLES CONTACTS

Actions	Last name	First name	Member	Employer	Title	Email	Phone
	Search	Search	All	All	Search	Search	Search
	Boyle	Way	Voting Member 1		VP	wb@pjm.com	610551212
	Boyle	Didi	Voting Member 5		VP	db@pjm.com	610551414
	Contact	Ferry	Voting Member 5		Vice President	fc@pjm.com	(605) 996-3853

Sort by column.

Filter by column.



The screenshot shows the 'Contact Management' dashboard. At the top, there is a 'Create & Assign' button. Below it are three tabs: 'MEMBER ROLES', 'UNASSIGNED MEMBER ROLES', and 'CONTACTS'. The 'CONTACTS' tab is active, displaying a table with columns for 'Actions', 'Last name', 'First name', and 'Member'. The table contains one entry: 'Marty', 'Marty', and 'Voting Member 1'. There are search boxes for 'Last name' and 'First name', and a dropdown for 'Member'.

Select **Create & Assign** to create contacts and assign roles.

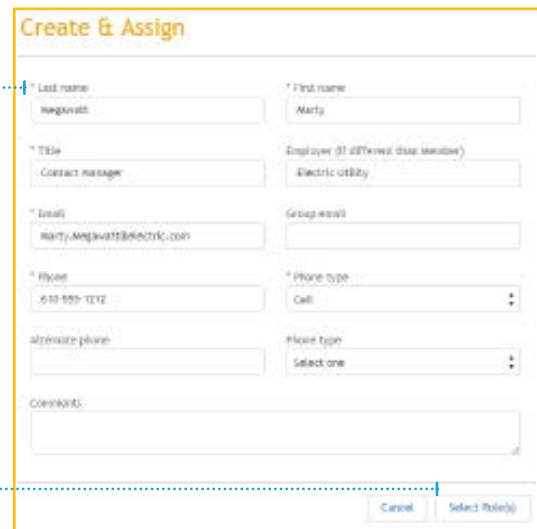


The 'Create & Assign Contact' dialog box prompts the user to 'Create a new contact or search for an existing contact'. It features a text input field with the placeholder 'Create contact or search by email...'. At the bottom, there are 'Cancel' and 'Create Contact' buttons.

Type in the text box to search for an existing contact. If the contact exists, select **View Contact**, then click on **Select Role(s)**.

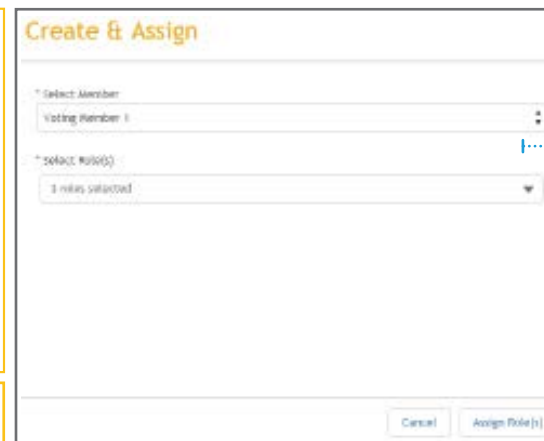
If the contact does not exist, select **Create Contact**.

After selecting **Create Contact**, fill in all fields noting (\*) are required.



The contact form contains the following fields: Last name (Majewski), First name (Marty), Title (Contact manager), Employer (Electric utility), Email (Marty.Majewski@Electric.com), Group email, Phone (610-999-1232), Phone type (Cell), Alternate phone, and Alternate phone type (Select one). There is a 'COMMENTS' section at the bottom. 'Cancel' and 'Select Role(s)' buttons are at the bottom right.

After the fields have been updated, click on **Select Role(s)**.



The 'Create & Assign' dialog box shows 'Select Member' with 'Voting Member 1' selected and 'Select Role(s)' with '1 roles selected'. 'Cancel' and 'Assign Role(s)' buttons are at the bottom.

After clicking **Select Role(s)**, select member company from drop down, select all roles that apply, click **Apply** then select **Assign Role(s)**.



The role assignment form for 'Voting Member 1' shows 'Authorized Representative' with 'Alternate' selected, 'Billing' with 'Alternate' selected, and 'Compliance' with 'Alternate' selected. 'Cancel' and 'Save' buttons are at the bottom.

To assign roles, select **Primary** or **Alternate** for each role. If the role has already been assigned to another contact, you will not be able to select a role. Click **Save**.