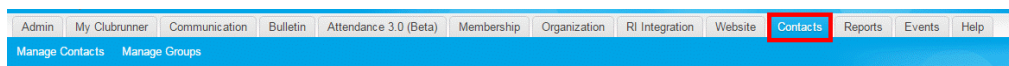


How do I edit a contact's personal information?

Michael C. - 2021-03-12 - Contacts

When you add a contact to your contacts list, a profile page for that contact is automatically generated. Through this profile page you can edit the contact's information and privacy settings. You can also edit their group assignments. Follow the steps below to access a contact profile.

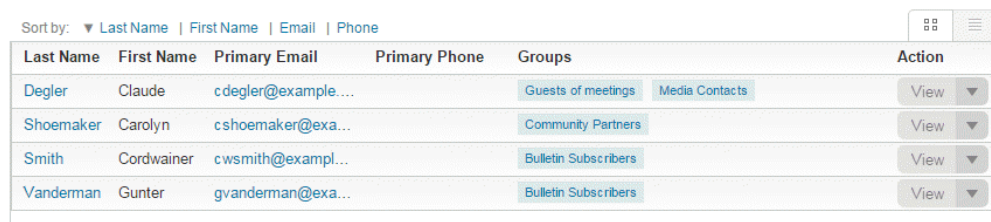
1. Log in to your website and access the member area. From the member area, click on the **Contacts** tab.



2. Now, click on the **Manage Contacts** link.



3. This brings you to the **All Contacts** page where you will see a list of all your existing contacts.

A screenshot of the 'All Contacts' page. It shows a table with columns: Last Name, First Name, Primary Email, Primary Phone, Groups, and Action. The 'Action' column has a 'View' link for each contact. The 'Groups' column shows the contact's group assignments.

Last Name	First Name	Primary Email	Primary Phone	Groups	Action
Degler	Claude	cdegler@example...		Guests of meetings Media Contacts	View
Shoemaker	Carolyn	cshoemaker@exa...		Community Partners	View
Smith	Cordwainer	cwsmith@exempl...		Bulletin Subscribers	View
Vanderman	Gunter	gvanderman@exa...		Bulletin Subscribers	View

4. Select the contact you wish to edit, and click the **View** link under the **Actions** column. Alternately, you may click on the Contact's last name.


A screenshot of the 'All Contacts' page. The 'View' link for Carolyn Shoemaker is highlighted with a red box.

Last Name	First Name	Primary Email	Primary Phone	Groups	Action
Degler	Claude	cdegler@example...		Guests of meetings Media Contacts	View
Shoemaker	Carolyn	cshoemaker@exa...		Community Partners	View
Smith	Cordwainer	cwsmith@exempl...		Bulletin Subscribers	View
Vanderman	Gunter	gvanderman@exa...		Bulletin Subscribers	View

5. You are brought to the **Contact Profile**. Here, you may edit their basic contact details, as well as add email addresses and other contact options.

Go back Add New Contact

Success Contact Carolyn Shoemaker added successfully.

 **Miss Carolyn Shoemaker**
Assign Groups

Personal Info Settings Privacy

Basic Info

Title: Miss	Gender:
First Name: Carolyn	Birthday:
Nick Name:	Anniversary:
Middle Name:	
Last Name: Shoemaker	
Suffix:	

Edit Basic Info

Addresses Add Address

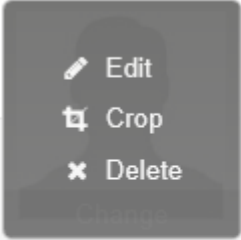
Numbers Add Phone Number

Emails Add Email

Primary Personal: cshoemaker@example.com

Editing the Contact's Photo

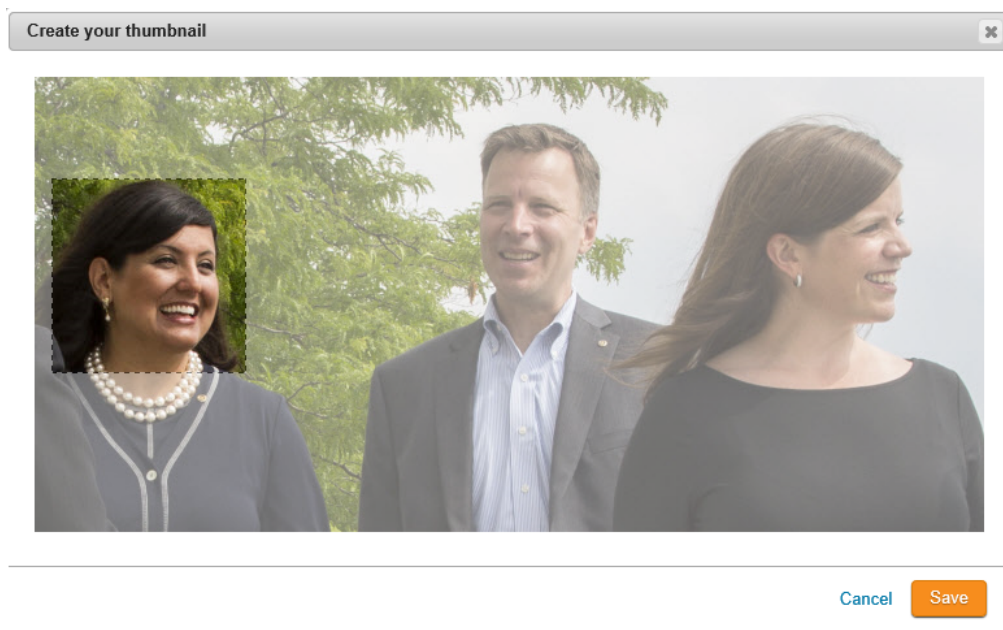
1. Click on the picture, near the top left.

 **Miss Carolyn Shoemaker**
Belongs to: Member Prospects Assign Groups

Personal Info Settings Privacy

Edit
Crop
Delete

2. Click **Edit** to upload or select a picture. To upload a picture, click on the **Upload** link after you click **Edit**.
3. If you need the picture cropped, click on the picture on the profile and then click **Crop**. This will open a window which will allow you to place a square around the person's head. Once you move it to the area that you would like cropped, click **Save** near the bottom right.



4. To remove the image, click on the picture on the profile and click **Delete**.

Editing the Contact's Basic Information

1. To edit the contact's basic details, click on **Edit Basic Info** in the **Basic Info** section of the profile.

A screenshot of a contact's profile page. The page has a header with three tabs: 'Personal Info', 'Settings', and 'Privacy'. Below the tabs is a sub-header 'Basic Info'. The main content area contains a form with the following fields: Title: Miss, First Name: Carolyn, Nick Name: , Middle Name: , Last Name: Shoemaker, Suffix: , Gender: Female, Birthday: , and Anniversary: . At the bottom right of the form is a button labeled 'Edit Basic Info' with a pencil icon, which is highlighted with a red box.

2. You may now make the required changes to the fields in the editing window that appears. When you're finished, click **Save**.

Edit Basic Contact Information

Title: Miss

First Name: Carolyn *

Nick Name:

Middle Name:

Last Name: Shoemaker *

Suffix:

Gender: ☐ Male ☒ Female

Birthday:

Show Birthday Year: ☐ Yes ☒ No

Anniversary:

Show Anniversary Year: ☐ Yes ☒ No

Cancel Save

How to Add a New Mailing Address

1. You may list a number of mailing addresses for a given contact. To add a new physical address, access the contact profile as above. Now, click the **Add Address** button under the heading **Addresses**.

Addresses

Add Address

2. A window appears wherein you may enter the address details in the fields provided. Use the **Address Type** drop down menu to select whether the new address is a business or home address.

The screenshot shows a web form titled "Add Contact Address" with a close button (X) in the top right corner. The form contains the following fields and options:

- Address Type:** A dropdown menu with "Home" selected. This field is highlighted with a red rectangular box.
- Address 1:** A text input field containing "42 Gernsback Way".
- Address 2:** An empty text input field.
- Address 3:** An empty text input field.
- City:** A text input field containing "Green Town".
- Country:** A dropdown menu with "United States" selected.
- State:** A dropdown menu with "Wisconsin" selected.
- Zip Code:** A text input field containing "54459".
- Use as Primary Address:** An unchecked checkbox.
- Buttons:** "Cancel" and "Save" buttons at the bottom right.

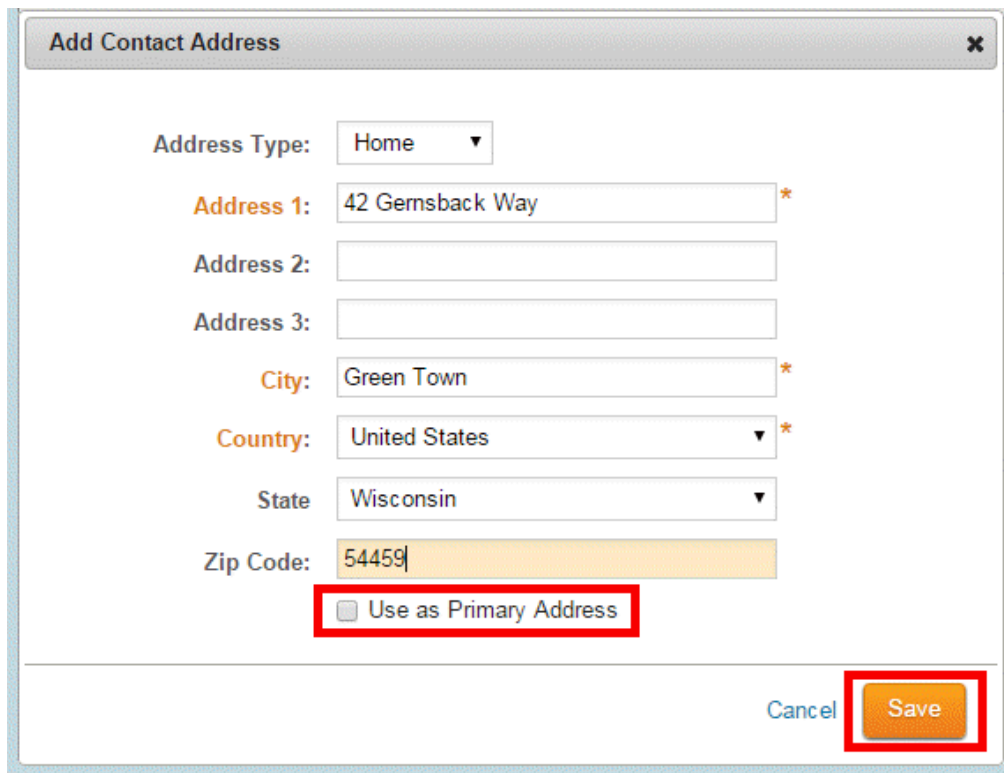
3. Enter the relevant address in the fields provided.

This screenshot shows the same "Add Contact Address" form, but with a red rectangular box highlighting a larger section of the form. The fields included in the red box are:

- Address Type:** The dropdown menu showing "Home".
- Address 1:** The text input field with "42 Gernsback Way".
- Address 2:** The empty text input field.
- Address 3:** The empty text input field.
- City:** The text input field with "Green Town".
- Country:** The dropdown menu with "United States".
- State:** The dropdown menu with "Wisconsin".
- Zip Code:** The text input field with "54459".

The "Use as Primary Address" checkbox and the "Cancel" and "Save" buttons remain visible below the highlighted section.

4. As you may enter multiple addresses for a given contact you have the option to select a **Primary Address**. Click the check box to identify this address as the primary one. This step is optional. When you are finished, click **Save**.



Add Contact Address [X]

Address Type: Home ▼

Address 1: 42 Gernsback Way *

Address 2:

Address 3:

City: Green Town *

Country: United States ▼ *

State: Wisconsin ▼

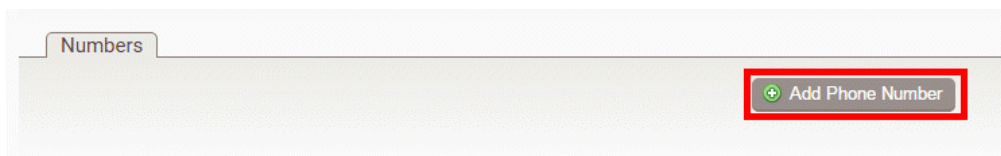
Zip Code: 54459

☐ Use as Primary Address

Cancel Save

How to Add a New Phone Number

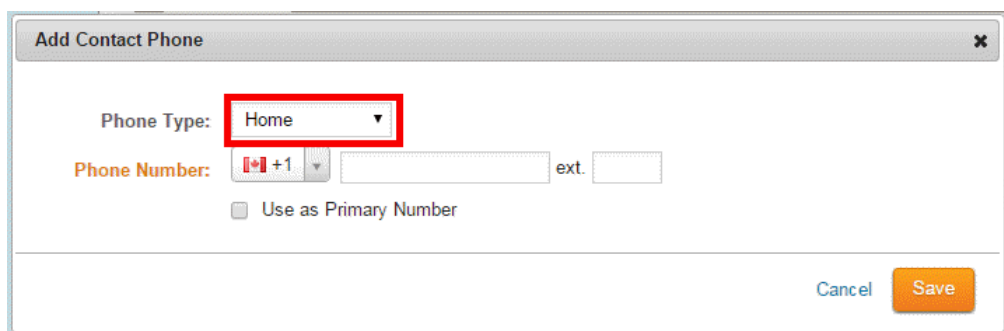
1. It is possible to assign multiple phone numbers to a contact's profile. To edit the phone numbers associated with the contact, access the Contact profile as outlined above. Now, click on **Add Phone Number** under the **Numbers** heading.



Numbers

+ Add Phone Number

2. In the pop up window that appears, identify the number as either as a home number or a business number using the **Phone Type** field.



Add Contact Phone [X]

Phone Type: Home ▼

Phone Number: +1 [] ext. []

☐ Use as Primary Number

Cancel Save

3. Enter the phone number in the fields provided. Remember to use the country calling code drop-down to select the contact's home country, if needed. The calling code defaults to the country where your club is registered.

Add Contact Phone

Phone Type: Home

Phone Number: +1 [] ext. []

☐ Use as Primary Number

Cancel Save

- Click the checkbox beside **Use as Primary Number** to indicate this is the preferred telephone number for the contact.

Add Contact Phone

Phone Type: Home

Phone Number: +1 [] ext. []

☒ Use as Primary Number

Cancel Save

- When you are finished, click **Save**.

Add Contact Phone

Phone Type: Home

Phone Number: +1 [] ext. []

☐ Use as Primary Number

Cancel Save

How to Add an Email Account

- You can associate a number of different emails with your contact's profile. To edit a contact's emails, access the Contact profile as outlined above. Now, click on **Add Email** under the **Emails** heading.

Emails

Primary • Personal: cdegler@example.com

Edit Delete

+ Add Email

- In the pop-up window that appears, select the **Email Type** from the drop-down field.

Add Contact Email

Email Type: Personal ▼

Email Address: *

☐ Use as Primary Email

Cancel Save

- Now, enter the email address in the provided field.

Add Contact Email

Email Type: Business ▼

Email Address: *

☐ Use as Primary Email

Cancel Save

- If you wish to identify this email as the main means of communicating with the client, click on the **Use as Primary Email** checkbox.

Add Contact Email

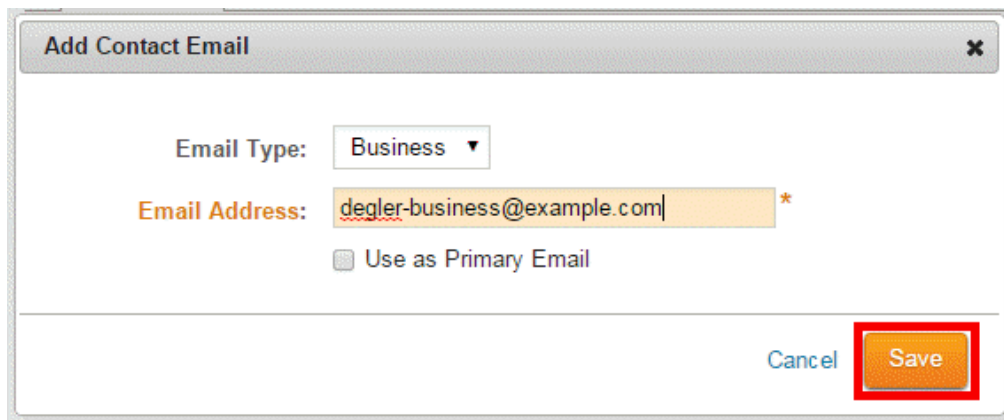
Email Type: Business ▼

Email Address: *

☒ Use as Primary Email

Cancel Save

- When you've finished, clicked **Save**.



Add Contact Email [X]

Email Type: Business ▾

Email Address: *

☐ Use as Primary Email

Cancel Save

How to Opt-Out a Contact from Club Communications and Emails

1. To opt-out a contact from Club communications or emails, click on **Privacy** in the contact's profile.



 **Miss Carolyn Shoemaker**

Belongs to: Member Prospects x Assign Groups

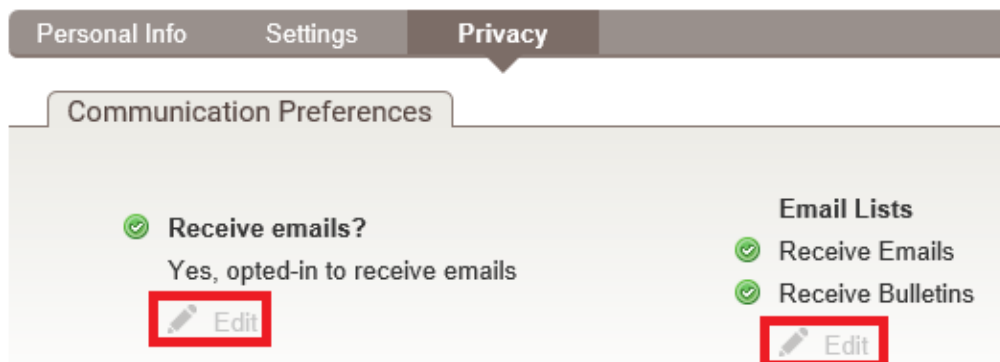
Personal Info **Settings** **Privacy**

Basic Info

Title: Miss	Gender: Female
First Name: Carolyn	Birthday:
Nick Name:	Anniversary:
Middle Name:	Friend of:
Last Name: Shoemaker	Company:
Suffix:	Job Title:
	Classification:



 Edit Basic Info

2. You can click on **Edit** below **Receive emails?** or **Email Lists**.



Personal Info **Settings** **Privacy**

Communication Preferences

<p>✓ Receive emails?</p> <p>Yes, opted-in to receive emails</p> <p> Edit</p>	<p>Email Lists</p> <p>✓ Receive Emails</p> <p>✓ Receive Bulletins</p> <p> Edit</p>
--	--

3. If you clicked **Edit** below **Receive emails?** you will get the pop up below. This will change the contact to opt-out of all Club communications and emails. Once done click **Save**.

Update Contact Communication Preferences

×

Receive email communication?

☒ Yes ☐ No

Cancel

Save

4. If you clicked **Edit** below **Email Lists** you will get the pop up below. This will let you select which Club communication the contact will no longer receive. Once done click **Save**.

Update Contact Communication Preferences

×

☒ Receive Emails

☒ Receive Bulletins

Cancel

Save

Related Content

- [How do I add a new contact?](#)