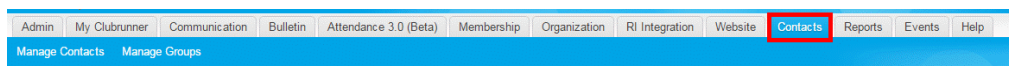


How do I edit a contact's personal information?

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.

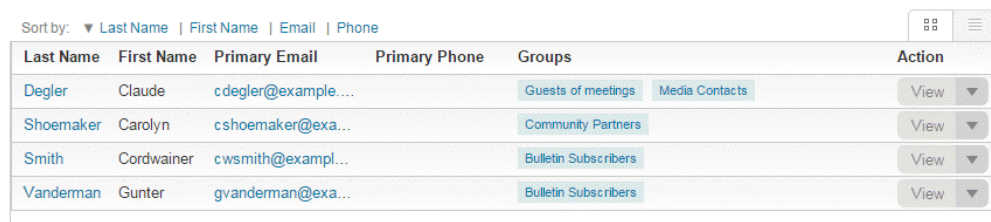
1. Log in to your website and access the member area. From the member area, click on the **Contacts** tab.



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. At the top, there is a 'Sort by:' dropdown menu with options: Last Name, First Name, Email, Phone. Below this is a table with the following columns: Last Name, First Name, Primary Email, Primary Phone, Groups, and Action. The table contains four rows of contact information.

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	csmith@exempl...		Bulletin Subscribers	View
Vanderman	Gunter	gvanderman@exa...		Bulletin Subscribers	View

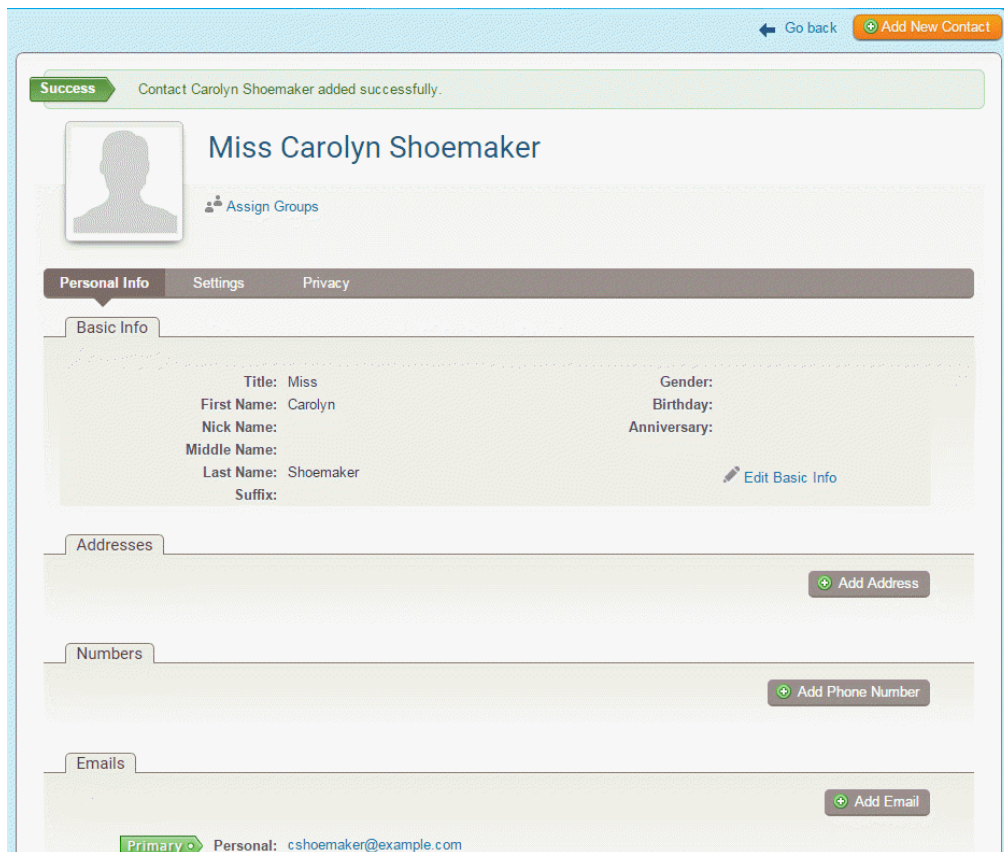
4. Select the contact you wish to edit, and click the **View** link under the **Actions** column. Alternately, you may click on the Contact's last name.



A screenshot of the 'All Contacts' page, identical to the previous one, but with the 'View' link in the 'Action' column for the contact 'Shoemaker Carolyn' highlighted in red.

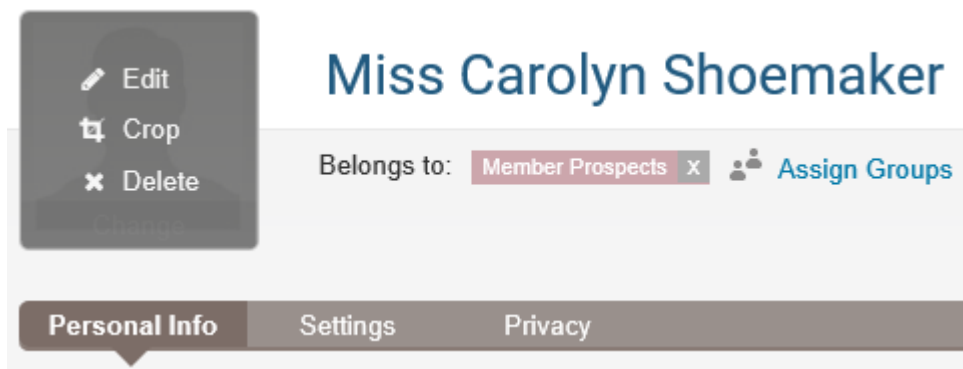
Last Name	First Name	Primary Email	Primary Phone	Groups	Action
Degler	Claude	cdegler@example...		Guests of meetings Media Contacts	View
Shoemaker	Carolyn	cshoemaker@exa...		Community Partners	View
Smith	Cordwainer	csmith@exempl...		Bulletin Subscribers	View
Vanderman	Gunter	gvanderman@exa...		Bulletin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

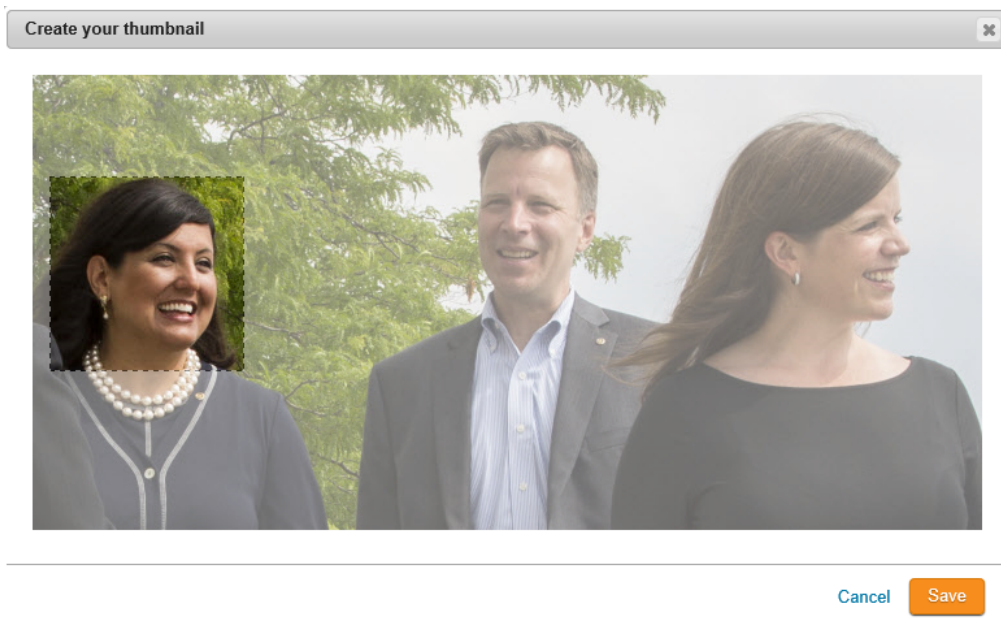


Editing the Contact's Photo

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



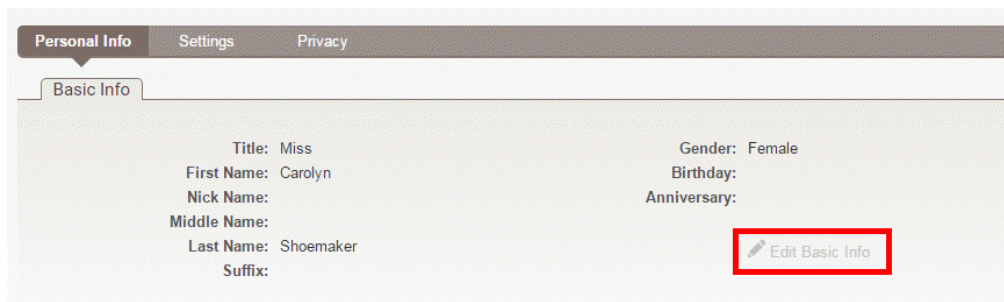
2. Click **Edit** to upload or select a picture. To upload a picture, click on the **Upload** link after you click **Edit**.
3. If you need the picture cropped, click on the picture on the profile and then click **Crop**. This will open a window which will allow you to place a square around the person's 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.



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

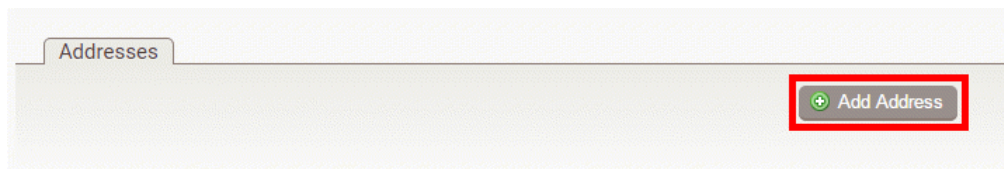
Anniversary:

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**.



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 window 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

At the bottom right of the form, there are two buttons: "Cancel" and "Save".

3. Enter the relevant address in the fields provided.

This screenshot shows the same "Add Contact Address" form as above, but with a red rectangular box highlighting the "Address 1", "Address 2", "Address 3", "City", "Country", "State", and "Zip Code" fields. The "Address Type" dropdown is now not highlighted. All other elements, including the "Use as Primary Address" checkbox and the "Cancel" and "Save" buttons, remain the same.

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

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

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

4. 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

5. 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

1. 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

Add Email

Primary Personal: cdegler@example.com

Edit Delete

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

Add Contact Email [X]

Email Type: Personal ▼

Email Address: *

Use as Primary Email

Cancel Save

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

Add Contact Email [X]

Email Type: Business ▼

Email Address: *

Use as Primary Email

Cancel Save

4. 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 [X]

Email Type: Business ▼

Email Address: *

Use as Primary Email

Cancel Save

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

Add Contact Email [X]

Email Type: Business ▾

Email Address: degler-business@example.com *

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

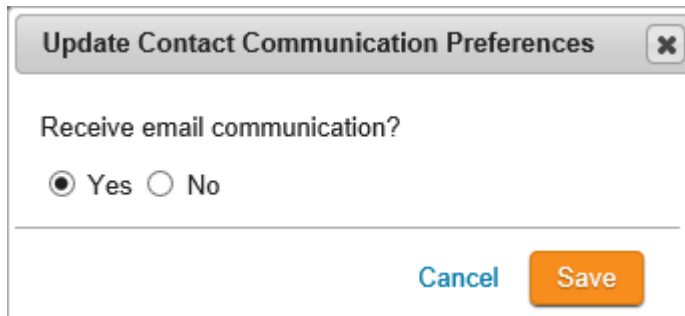
2. You can click on **Edit** below **Receive emails?** or **Email Lists**.

Personal Info Settings **Privacy**

Communication Preferences

<p><input checked="" type="checkbox"/> Receive emails?</p> <p>Yes, opted-in to receive emails</p> <p><input type="text" value="Edit"/></p>	<p>Email Lists</p> <p><input checked="" type="checkbox"/> Receive Emails</p> <p><input checked="" type="checkbox"/> Receive Bulletins</p> <p><input type="text" value="Edit"/></p>
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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**.



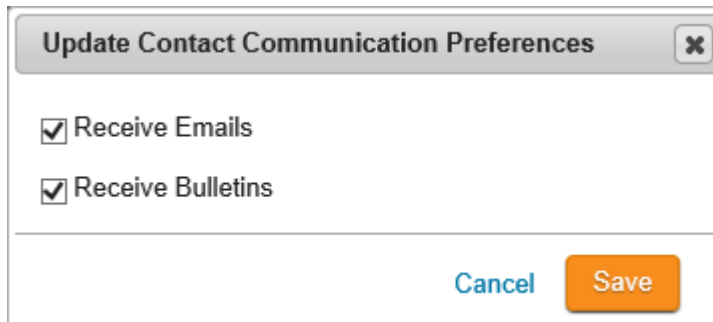
Update Contact Communication Preferences ✕

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?](#)