



Extranet 4.0 Member Instructions

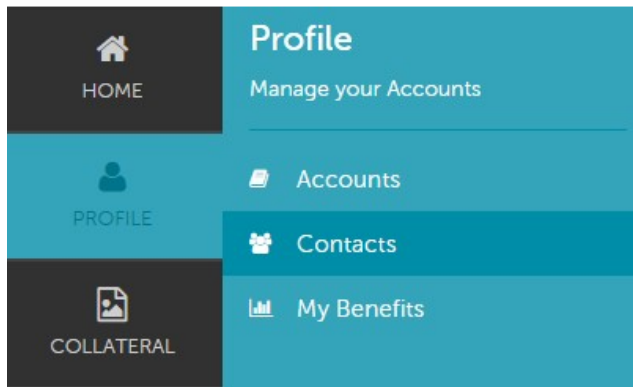
Contacts

<https://manitoba.extranet.simpleviewcrm.com>

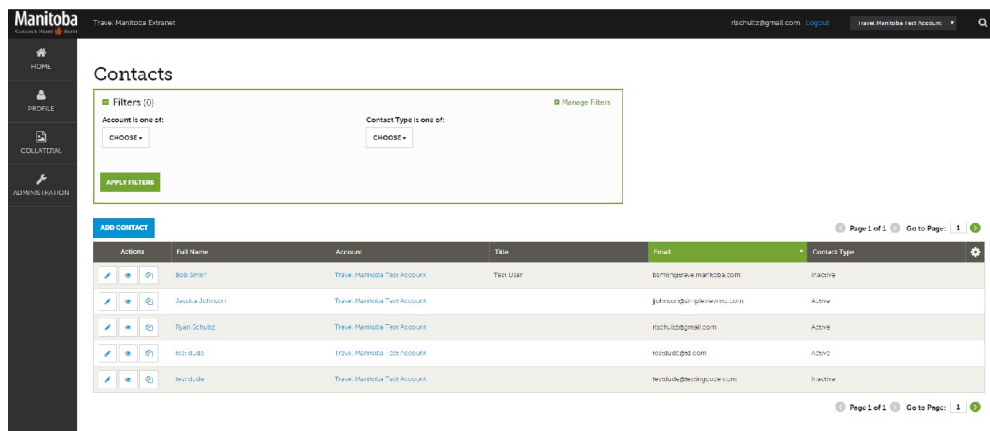
**Travel Manitoba
21 Forks Market Road
Winnipeg, Manitoba
Canada R3C 4T7
www.travelmanitoba.com**

Profile > Contacts

- The Contacts area will allow you to manage all of the contacts associated with your account.



- The main contacts page will list all of the contacts associated with your account.



- You can navigate this page in the following manner:
 - The Pencil icon will bring you to the Update Contact page and allow you to edit the contact information.
 - The Eye icon or your Contact Name will bring you to the Contact Details page.
 - Once on the Contact Details page clicking the Edit button will bring you to the Update Contact page.
 - Clicking the Clone button on the Contact Details page will create a new contact, keeping all the information of the contact you were previously viewing. This allows you to create a new contact simply by entering a new name while retaining all the information of the existing contact.
 - The Pages icon will allow you to clone any existing contact as outlined above.



- To add a new contact, click the Add Contact button.



Profile > Contacts > New Contact > Contact Information

- Basic information such as name, title and email can be entered in this area.
- Please note that in order to receive email (industry events, reminders, promotions, etc.) from Travel Manitoba you must set the Send Email field to yes. See below.



- Also please note that contacts cannot be deleted; they can only be made inactive.
- All fields with "Required" need to be completed in order to create a new or edit an existing contact.

Contact Information

Account: *Required	First Name: *Required
Travel Manitoba Test Account	
Last Name: *Required	Full Name: *Required
Title:	Contact Type: *Required
	--Choose One--
Email:	Send Email: *Required
	<input type="radio"/> YES <input type="radio"/> NO

Profile > Contacts > New Contact > Address Information

- To edit the address information, click on any of the pencil icons next to either physical, billing or shipping.
- Please note, all address information will be defaulted to the information found on the account.
- Clicking the pencil icon will allow you to chose the existing physical address, enter a custom address or keep the address the same as the account.

The image shows a user interface for managing contact address information. On the left, there is a sidebar titled "Address Information" with three sections: "Physical Address", "Billing Address", and "Shipping Address". Each section contains a list of address details: Address 1 (21 Forks Market Road), City (Winnipeg), State/Province (MB), Zip/Postal Code (R3C 4T7), and Country (CANADA). A pencil icon is next to each section header. A red arrow points from the "Billing Address" pencil icon to a modal window titled "Billing Address".

The modal window has three tabs: "Same As Physical" (highlighted in green), "Custom Address", and "Same As Account". Below the tabs are form fields for "Street Address" (with a red asterisk and "Required" label), "City" (with a red asterisk and "Required" label), "State/Province" (with a red asterisk and "Required" label), "Zip/Postal Code" (with a red asterisk and "Required" label), and "Country" (with a red asterisk and "Required" label). The "Street Address" field contains "21 Forks Market Road", "City" contains "Winnipeg", "State/Province" is a dropdown menu with "MB" selected, "Zip/Postal Code" contains "R3C 4T7", and "Country" is a dropdown menu with "CANADA" selected. At the bottom right of the modal are two buttons: "APPLY CHANGES" and "CANCEL".

Profile > Contacts > New Contact > Phone Information & General

- General phone information can be entered here as well as a users LinkedIn URL.

The screenshot displays a contact form with two main sections: "Phone Information" and "General".

Phone Information: This section contains four input fields arranged in a 2x2 grid. The top-left field is labeled "Primary Phone:" and includes a small "Ext" button to its right. The top-right field is labeled "Mobile Phone:". The bottom-left field is labeled "Alternate Phone:" and includes a small "Ext" button to its right. The bottom-right field is labeled "Fax:" and includes a small "Ext" button to its right.

General: This section contains a single input field labeled "LinkedIn URL:".

- After editing your contacts, click on the Save button to save your changes.

Profile > Contacts > Cloning process for replacement contacts

- When a contact leaves your business and a new person is hired please follow the steps below:
 - Click the clone button to clone the old contact.
 - Enter the new person's information into the cloned contact and click save.
 - Click the pencil icon to edit the old contact and change their Contact Type to Inactive.