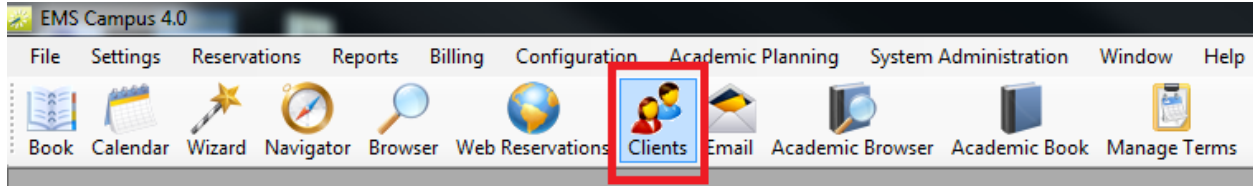
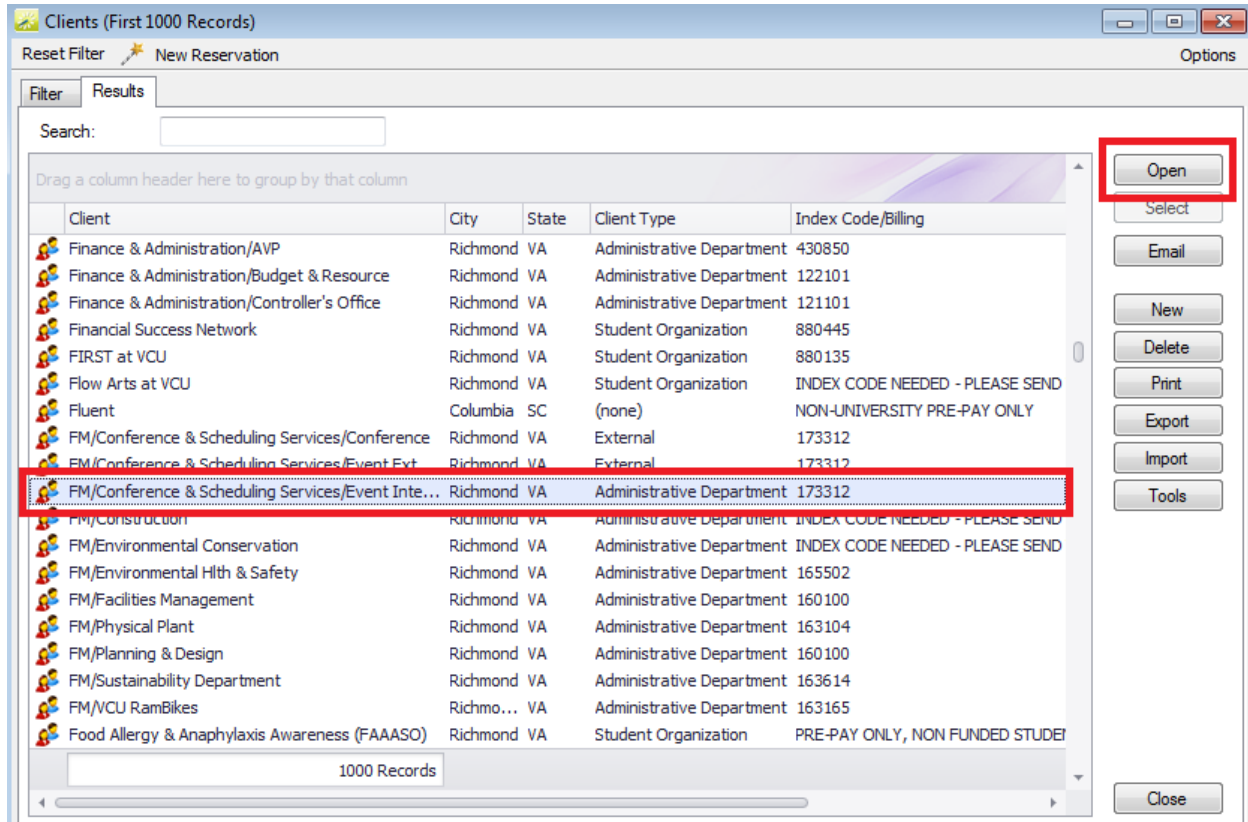


How to Change Client Contact Information

1. Select "Clients" from the main menu.



2. The Client information box will appear listing all of the clients in the system. To add, edit or delete the contact information for a client, select the client from the list. Click "Open."



3. An information box will appear giving all the information of that client. From the list on the left, select "Contacts." A list of contacts will appear. Here you can add a new contact, edit a contact or make a contact inactive.

FM/Conference & Scheduling Services/Event Internal

Contacts (4)

Show Inactive

Drag a column header here to group by that column

Contact	Title	Phone 1	Phone 2	Email Address	Default Contact
Brad Bower	Coordinator of Scheduling	804-828-0317		bowberbs@vcu.edu	Yes
Mary Bramley	Conference Services Coordinator	804-828-9585		bramleymf@vcu.edu	
Nichole Smithson	Manager	804-828-7465		nsmithson@vcu.edu	
Robbie Schnizler	Conference Services Coordinator	804-828-4491		rjschnizler@vcu.edu	

4 Records

Close

New
Edit
Delete
Tools
Email
Set Default

a. To **add a new contact**, click “New.” An information box will appear where you fill in all the general information regarding the new contact. Click “OK” when finished. For this example, we will add John Smith to our contact list.

Contact

Contact: John Smith

Title: Services Coordinator

Client: FM/Conference & Scheduling Services/Event Internal

Address: 700 West Grace St.
P.O. Box 843011

City ST Zip: Richmond VA 23284

Country:

Phone: 804-828-0317

Fax:

Email Address: smithj@vcu.edu

External Reference:

Notes:

Set As Default:

Inactive

Spelling OK Cancel

b. To **edit an existing contact's information**, select the contact from the list and click “Edit.”

FM/Conference & Scheduling Services/Event Internal

Show Inactive

Drag a column header here to group by that column

Contact	Title	Phone 1	Phone 2	Email Address	Default Contact
Brad Bower	Coordinator of Scheduling	804-828-0317		bowerbs@vcu.edu	Yes
John Smith	Services Coordinator	804-828-0317		smithj@vcu.edu	
Mary Bramley	Conference Services Coordinator	804-828-9585		bramleymt@vcu.edu	
Nichole Smithson	Manager	804-828-7465		nsmithson@vcu.edu	
Robbie Schnizler	Conference Services Coordinator	804-828-4491		rjschnizler@vcu.edu	

5 Records

Close

New Edit Delete Tools Email Set Default

c. To **make a contact inactive**, select the contact from the list and click “Edit.” In the bottom left corner of the contact’s information box select “Inactive.” We recommend making your contacts inactive instead of deleting them.

The image shows a software window titled "Contact" with a tabbed interface. The "Contact" tab is active, showing a form for editing contact information. The fields are as follows:

- Contact: John Smith
- Title: Services Coordinator
- Client: FM/Conference & Scheduling Services/Event Internal
- Address: 700 West Grace St., P.O. Box 843011
- City ST Zip: Richmond VA 23284
- Country: (empty)
- Phone: 804-828-0317
- Fax: (empty)
- Email Address: smithj@vcu.edu
- External Reference: (empty)
- Notes: (empty text area)
- Set As Default: (unchecked)

On the right side of the form, there are two checkboxes:

- Use Client Address:
- International:

At the bottom left of the window, there is a checkbox labeled "Inactive" which is checked and highlighted with a red box. At the bottom right, there are buttons for "Spelling" (with an ABC icon), "OK", and "Cancel".