

## MANAGING OUR CONTACTS LIST (Needs to be updated as this will be done in Monkey Chimp going forward)

To Add Someone to our Mailing List (Contacts List)

1. Logon to the website with your Administrator's username.

Available Administration Functions

**Speaker and Presentation Mgmt**

- Edit Presentation Schedule
- Speaker Registration
- Edit Speaker Status Checklist
- Edit Speaker Needs Checklist
- Create Roadshow Appointments
- Roadshow Appointment Participation
- Class Roster Emails

Contents

- Events (7)
- Speakers (14)
- Presentations (28)
- Participants (203)
- Payments (0)
- Deposits (0)
- Contacts (1035)**

Reference Data

- Freq Asked Questions (9)
- Road Show Slots (20)

2. Click on the green number next to “Contacts”, and you will see this.

Contacts - All

Home | Log out dianawild

Block View | Select an action...

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sort | filter | column edits | delete rows | quick-add | hide text

Delete	L Name	F Name	Full Name	Email	User Name	
<input type="checkbox"/>	Aaskov	Linda	Linda Aaskov	aaskov@myfairpoint.net	Researcher	2d14d
<input type="checkbox"/>	Abell	S. Janice	S. Janice Abell		janice	21edc
<input type="checkbox"/>	Acosta	Sheri	Sheri Acosta		peaceables	
<input type="checkbox"/>	Adler	Charles	Charles Adler		cadler	d9504
<input type="checkbox"/>	Ahearn	Marie	Marie Ahearn	marieahe@yahoo.com	marlea	49081
<input type="checkbox"/>	Ahrens	Ellen	Ellen Ahrens	laem5955@yahoo.com	laem5955	

EVERYTHING BELOW HERE ALSO APPLIES TO THE “PARTICIPANTS” LIST.

3. Is there a possibility we already have this person? If so, filter the list (search the database for the person).

- Click on “Filter”
- Enter the information you are searching for in the first field, for example, “Smith”
- Enter the website field the data is likely to be stored in, for example, “LNAME” for last name.
- Click on Search, you will see this. Everyone in the database with last name “Smith”.

sort | filter | column edits | delete rows | quick-add | hide text

Only show rows with  in

Delete	L Name	F Name	Full Name	Email	User Name	Passwd	Ad
<input type="checkbox"/>	Smith	Helen	Helen Smith	hhsctc@aol.com	helensmith	5411ef2d3bd1a4995d8c9b61ee0e0fb009ff4f66	530 We
<input type="checkbox"/>	Smith	June	June Smith	CWSMITH128@VERIZON.NET	Tiverton	a7ecb8cfaaf7d4525bc1d3d6489048d3687a1ca4	128 Riv
<input type="checkbox"/>	Smith	Nancy	Nancy Smith	CWSMITH128@VERIZON.NET	Nancy		128 Riv
<input type="checkbox"/>	Smith	Corinne	Corinne Smith	jwcmcs@aol.com	Corinne		5 Cabot
<input type="checkbox"/>	Smith	Katherine	Katherine Smith	the4smiths@comcast.net	kathylean	cd1c49835a1919e7135a20b51e12c4533c09cf42	450 Ver
<input type="checkbox"/>	Smith	Krista	Krista Smith	KJoy717@gmail.com	kristajoy		115 Hill
<input type="checkbox"/>	Smith	Sarah M.	Sarah M. Smith	seads4@aol.com	sarahbeth	61c95d55a3f20ba2a95d2d62127da9d635db8061	75 Aller
<input type="checkbox"/>	Smith	Karen	Karen Smith	robertsmith13@verizon.net	kamardensmith	2885a3c36288b355063f00f4776b7f70635317a6	1 Debor
<input type="checkbox"/>	Smith	Brenda	Brenda Smith		mbrenda	b62027056e90bbae8334476cd256011b1703633e	
<input type="checkbox"/>	Smith	Thomas	Tom Smith	tmsmithjr@aol.com	tmsmithjr	e59abed352187d91ebc12f44c8329e29b4656254	179 Pov
<input type="checkbox"/>	Smith	Sarah M.	Sarah M Smith	seads4@aol.com	seads4	a028262bd6fc45a85093b83c70b7c4aa4de53d5	75 Aller

4. If your Smith is not already there. Select “Add New Contact” from the “Select an action...” drop down list.

Block View

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sort | filter | column edits | delete rows | quick-add | hide text

Only show rows with  in

Delete	L Name	F Name	Full Name	Email	User Name	Passwd	Address
<input type="checkbox"/>	Smith	Helen	Helen Smith	hhsctc@aol.com	helensmith	5411ef2d3bd1a4995d8c9b61ee0e0fb009ff4f66	530 West
<input type="checkbox"/>	Smith	June	June Smith	CWSMITH128@VERIZON.NET	Tiverton	a7ecb8cfaaf7d4525bc1d3d6489048d3687a1ca4	128 River
<input type="checkbox"/>	Smith	Nancy	Nancy Smith	CWSMITH128@VERIZON.NET	Nancy		128 River
<input type="checkbox"/>	Smith	Corinne	Corinne Smith	jwcmcs@aol.com	Corinne		5 Cabot

5. You will be presented with this form to fill out any information you have about the person. If you provide an email address, we will use that as our primary method of contact with the person. If you only provide a street address, they will receive two post cards from us each year, “Save the Date” and “Pre-Registration is Open”. We do not use their phone number except for special cases. So the minimum data needed is Last Name, First Name and Email or Street Address. **Be sure to save your changes.**

L Name	Wild
F Name	Diana
Full Name	Diana Wild
Email	dianawild@gmail.com
User Name	dianaparticipant
Passwd	weldd9
Address Line 1	
Address Line 2	
City	
State	-- select --
Zipcode	
Day Phone	
Eve Phone	
Gender	
Lds Member	<input type="checkbox"/>
Staff Title	
Continuing Interest	<input checked="" type="checkbox"/>
Comment	Has also done Registration and Photography

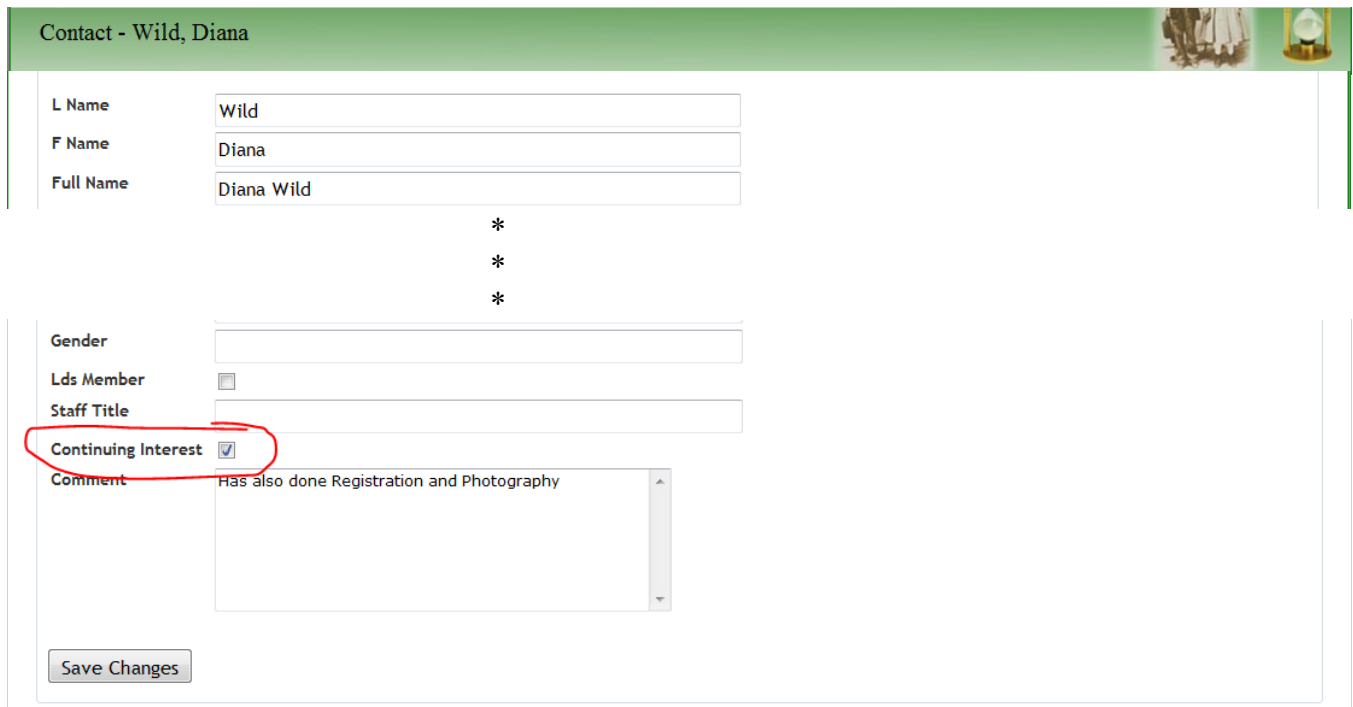
Save Changes

## 6. Removing a contact.

To remove a contact without deleting the record, you will use the “Continuing Interest” indicator.

Go to the contact record you want to remove, either by filtering the list to a subset of contacts or by scrolling/paging down to the contact.

Scroll down to the lower half of the page and Un-click the “Continuing Interest” check box. This indicator is automatically clicked “on” when a new contact is added to the database.



Contact - Wild, Diana

L Name: Wild

F Name: Diana

Full Name: Diana Wild

Gender:

Lds Member: ☐

Staff Title:

Continuing Interest: ☒

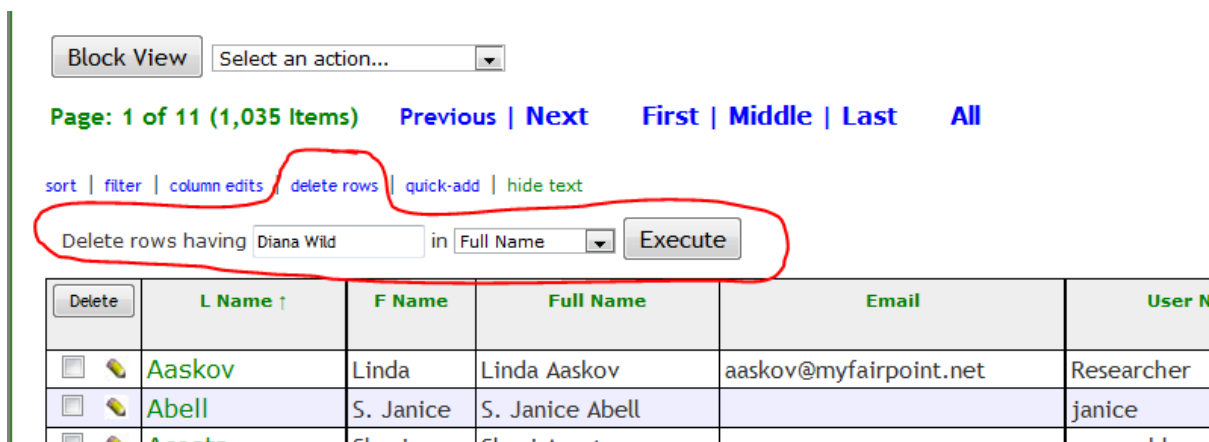
Comment: Has also done Registration and Photography

Save Changes

## 7. To Delete a Contact Record

Generally, we do not delete contacts from our database. This gives us complete historical information about who has attended our conferences. However, sometimes a mistake is made and a record really needs to be deleted.

Click on “Delete Rows” and type in the Full Name of the person you want to delete.



Block View Select an action...

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sort | filter | column edits | delete rows | quick-add | hide text

Delete rows having Diana Wild in Full Name Execute

Delete	L Name ↑	F Name	Full Name	Email	User N
<input type="checkbox"/>	Aaskov	Linda	Linda Aaskov	aaskov@myfairpoint.net	Researcher
<input type="checkbox"/>	Abell	S. Janice	S. Janice Abell		janice
<input type="checkbox"/>	Acosta	Shari	Shari Acosta		researcher