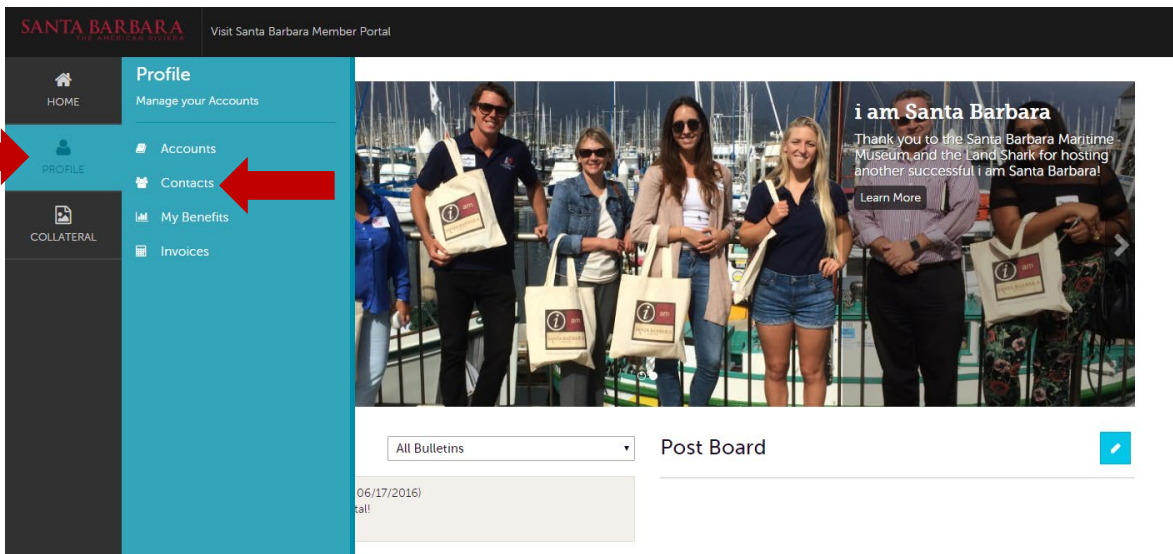


5 SIMPLE STEPS FOR UPDATING CONTACTS

Each Member's list of contacts is visible only to Visit Santa Barbara staff and is used to ensure we are communicating with the appropriate members of your team.

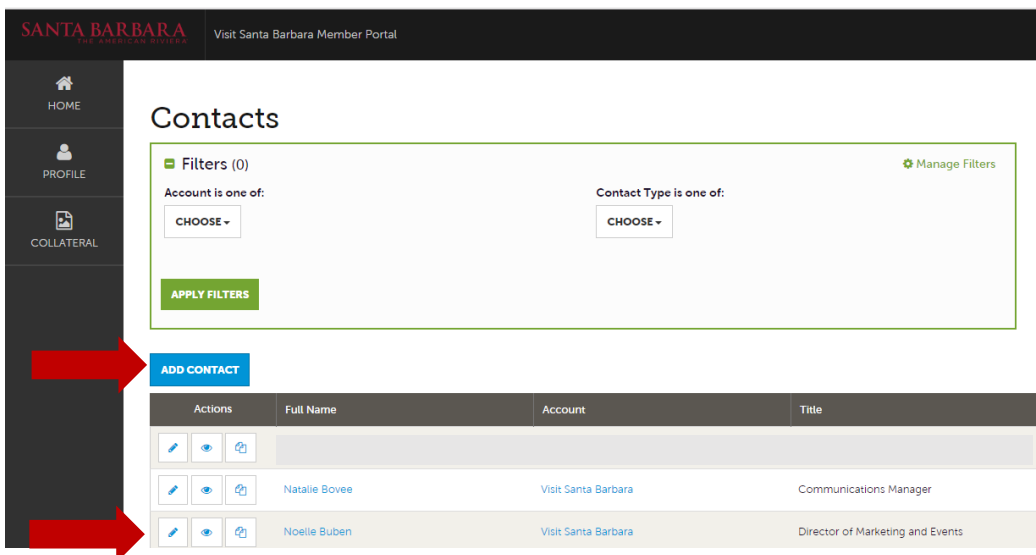
Contacts are also referred to when distributing sales leads, responding to press, PR and social media opportunities, sending invitations, newsletters and invoices, and also for networking with your fellow VSB members!

1. Log into the member portal using your email and password*:
<https://santabarbara.extranet.simpleviewcrm.com/login/#/login>
2. Under the "profile" menu on the left, select "contacts"









The screenshot shows the Santa Barbara Member Portal interface. On the left, a teal navigation menu is visible with the following items: HOME, PROFILE (selected), My Benefits, and Invoices. A red arrow points to the 'PROFILE' menu item, and another red arrow points to the 'Contacts' option within the profile menu. The main content area features a banner image of people at a marina with the text 'i am Santa Barbara' and a 'Post Board' section below it.

3. Click ADD CONTACT to add a new associate.



The screenshot shows the 'Contacts' page in the Member Portal. A red arrow points to the 'ADD CONTACT' button. Below the button is a table of existing contacts. The table has columns for Actions, Full Name, Account, and Title. Two contacts are listed: Natalie Bovee (Communications Manager) and Noelle Buben (Director of Marketing and Events).

Actions	Full Name	Account	Title
  	Natalie Bovee	Visit Santa Barbara	Communications Manager
  	Noelle Buben	Visit Santa Barbara	Director of Marketing and Events

4. Enter contact information.

Update Contact

SAVE **CANCEL**

Sections:

- Contact Information
- Address Information
- Phone Information
- Additional Information
- General

Contact Information

Account: *Required
Visit Santa Barbara

Last Name: *Required
Wine

Department:

Contact Type: *Required
Secondary

Email:
paulina@santabarbaraca.com

First Name: *Required
Paulina

Full Name: *Required
Paulina Wine

Title:
Industry Relations and Membership Sales Associate

Preferred Contact Method:
Email

Send Email:
 YES NO

Tip: To make an associate inactive, go to "Contact Type" and select "Inactive."

Note: Please pay close attention to "Email" address spelling.

5. Click SAVE

6. To edit a contact, click on the pencil icon next to their name.

Update Contact

SAVE **CANCEL**

Sections:

- Contact Information
- Address Information
- Phone Information
- Additional Information
- General

Contact Information

Account: *Required
Visit Santa Barbara

Last Name: *Required
Wine

Department:
Membership

Contact Type: *Required
Secondary

Email:
paulina@santabarbaraca.com

First Name: *Required
Paulina

Full Name: *Required
Paulina Wine

Title:
Industry Relations Coordinator

Preferred Contact Method:
Email

Send Email:
 YES NO

*For questions or more information,
contact Shantel Rowe at Shantel@SantaBarbaraCA.com*