

Viewing Contact Records

The contacts Menu Item allows you to quickly search for a contact and view their contact record.

The contacts listed on the page are any contact that has previously created a connection to an opportunity managed by your organization.

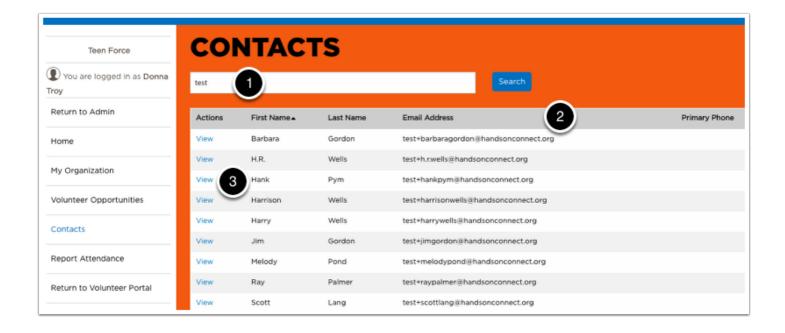
In most cases, sharing portal users cannot create new contacts. This is to avoid having duplicate contacts in our database.

In most cases, sharing portal users cannot edit existing contacts. This is because volunteers generally update their own contact information.

Contact Search

- 1. The Search box allows you to quickly filter the list of contacts and find the one you are looking for. You can start typing in first or last name, or email address, and the list will filter to find matches.
- 2. Clicking on a column header will sort the list alphabetically. Clicking again will reverse the sort.
- 3. Click on View to see the contact record.





Contact Detail View

- 1. The contact detail page shows you basic contact information for the contact, and a list of all their 'connections' with your organization.
- 2. You can narrow the list of connections by entering any keyword in the search box, or
- 3. Use any of the filters to narrow the results further.
- 4. Click on the Volunteer Opportunity Name if you wish to go to the volunteer opportunity record.



