

Contact Manager Quick Guide



Create and assign contacts with associated roles.

Search by first or last name.

Edit or delete role assignments.

Select the **Unassigned Member Roles** tab to view roles that haven't been assigned.

Select the **Contacts** tab to view all contacts.

Edit contact information or delete all roles for contact.

Contacts that do not have a delete button are designated Contact Managers and can only be removed by completing and submitting the Attestation Form.

Actions	Last name	First name	Member	Role	Type
	Nunes	Luz	Voting Member 1	Affiliate Disclosure Signer	Primary
	O'Brien	Sue	Voting Member 1	Affiliate Disclosure Signer	Alternate

Member	Role	Type
Voting Member 3	Affiliate Disclosure Signer	Alternate
Voting Member 1	Authorized Representative	
Voting Member 5	Credit	Alternate
Voting Member 5	Information Technology	Primary
Voting Member 5	Officer Certification Form	Alternate
Voting Member 5	Officer of the Company	Primary

Actions	Last name	First name	Member	Employer	Title	Email	Phone
	Boyle	May	Voting Member 1		VP	vib@pjm.com	6109551213
	Boyle	Didi	Voting Member 5		VP	dol@pjm.com	6109551414
	Contact	Harry	Voting Member 5		Vice President	hol@pjm.com	(609) 996-3883

To export the data, select the **Export: CSV** link on the Member Roles, Unassigned Member Roles or Contacts tab.

Select **Role Definitions** for descriptions of roles.

To add or remove a Contact Manager, select the **Attestation Form** and submit to PJM.

Sort by column.

Filter by column.

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Select **Create & Assign**
to create contacts and
assign roles.

Contact Management

Create & Assign

MEMBER ROLES **UNASSIGNED MEMBER ROLES** **CONTACTS**

Actions	Last name	First name	Member
<input type="button" value="Search"/> <input type="button" value="Search"/> <input type="button" value="All"/>	Maslas	Liz	Voting Member 1

Type in the text box to search for
an existing contact. If the contact
exists, select **View Contact**, then
click on **Select Role(s)**.

If the contact does not
exist, select **Create
Contact**.

After selecting **Create
Contact**, fill in all fields
noting (*) are required.

Create & Assign Contact

Create a new contact or search for an existing contact
Create contact or search by email...

Create & Assign

Select Member
Voting Member 1

Select Role(s)
3 roles selected

Create & Assign

Voting Member 1

authorized Representative*	<input type="radio"/> Primary <input type="radio"/> Alternate
Billing*	<input type="radio"/> Primary <input checked="" type="radio"/> Alternate
Compliance	<input type="radio"/> Primary <input checked="" type="radio"/> Alternate

After the fields have
been updated, click on
Select Role(s).

Create & Assign

Select Member
Voting Member 1

Select Role(s)
3 roles selected

Create & Assign

Voting Member 1

authorized Representative*	<input type="radio"/> Primary <input type="radio"/> Alternate
Billing*	<input type="radio"/> Primary <input checked="" type="radio"/> Alternate
Compliance	<input type="radio"/> Primary <input checked="" type="radio"/> Alternate

After clicking **Select Role(s)**,
select member company from
drop down, select all roles
that apply, click **Apply** then
select **Assign Role(s)**.

To assign roles, select **Primary**
or **Alternate** for each role.
If the role has already been
assigned to another contact,
you will not be able to select a
role. Click **Save**.