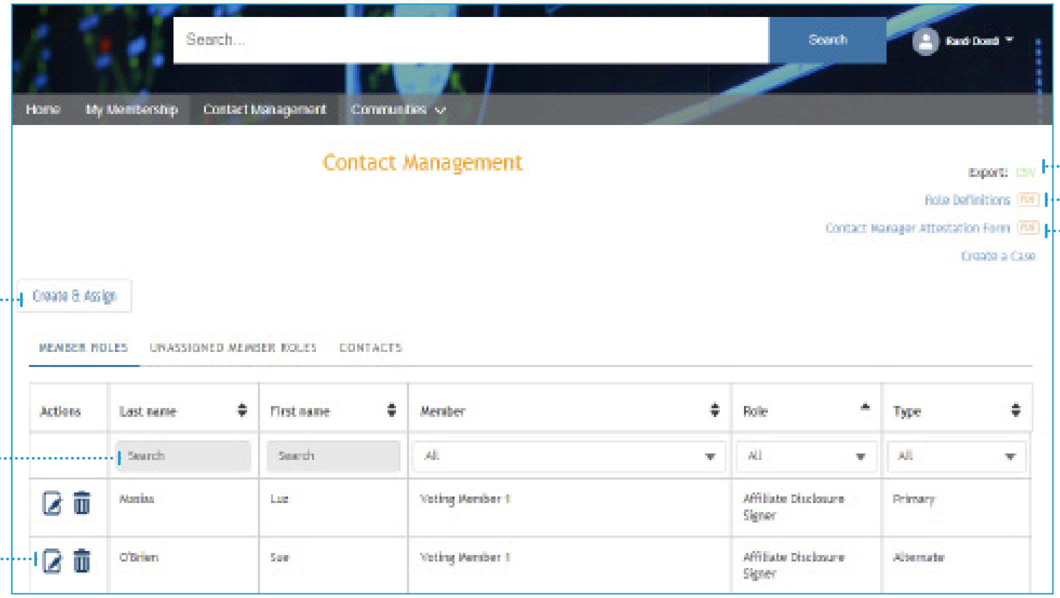
Contact Manager **Quick Guide**



Create and assign contacts with associated roles.

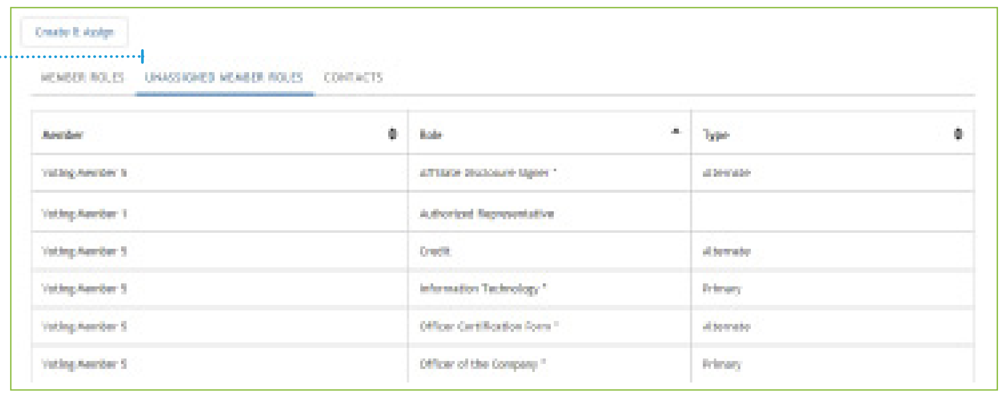
Search by first or last name.

Edit or delete role assignments.

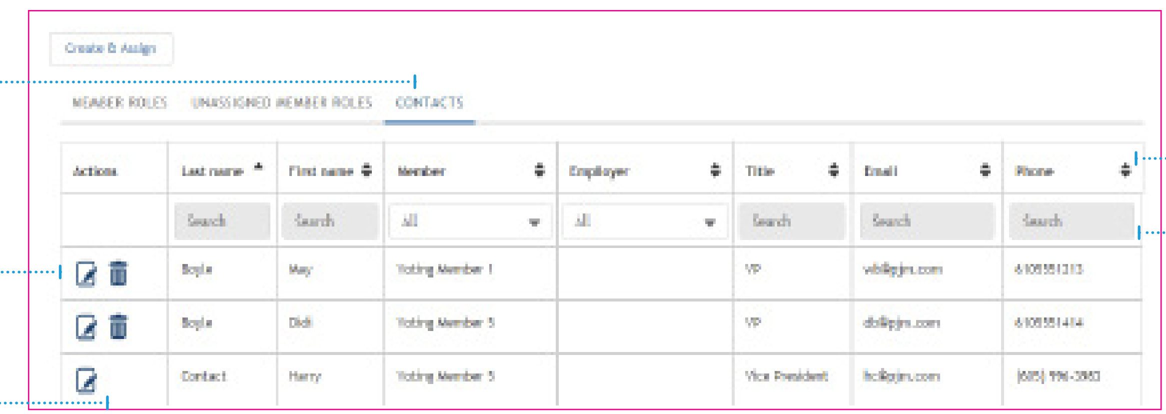
To export the data, select the **Export: CSV** link on the Member Roles, Unassigned Member Roles or Contacts tab.

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

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



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



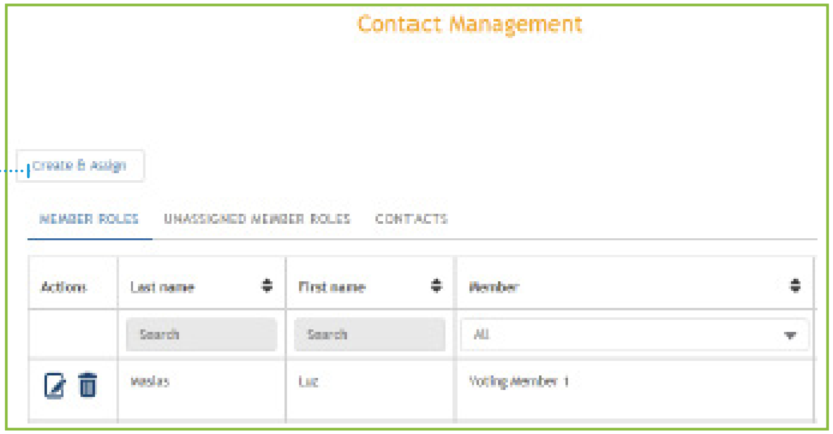
Select the **Contacts** tab to view all contacts.

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.

Sort by column.

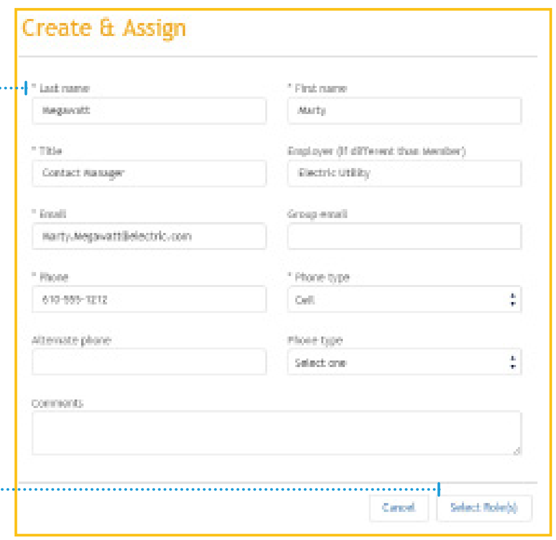
Filter by column.



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

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

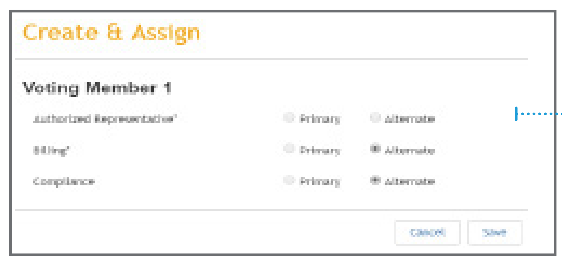
If the contact does not exist, select **Create Contact**.



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

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

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**.

Contact: membershipforms@pjm.com