

HOW TO CHANGE YOUR CONTACTS MARKETING COMMUNICATION PREFERENCES - DESKTOP

Does your contact want to opt out of receiving certain marketing communications? This guide will show you how to opt a contact in or out of recieving email, sms, telephone calls or mail.

O1 Select the Accounts and Prospects search bar on the home page and type the name of the account that your contact is associated with then click Search.



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Search Resu	Its (12) : Showing (1	I-12) Assign Contact	Account	tSummary							Print B. Export & Table Lawout
Au Ci	Name	Town	County	Postcode	Telephone	Email	Туре	Date Added	Business Type	Sales Rep Description	
C00167	MIKE EDWARDS	WIRRAL		CH44 1AT	01516380104,		c	Fri 5 Sep 2008 at 11:06 am		Michael Kennedy	i i
C00754	MIKE BENNETT	NORTHWICH	CHESHIRE	CW8 4SL	01606 781718,		с	Fri 5 Sep 2008 at 11:06 am		Matthew Dean	
C00953	MIKE BULL	GWYNEDD		LL552DX	01286 673908,		с	Fri 5 Sep 2008 at 11:06 am		Peter Williams	
C01141	MIKE BENNETT	ANGLESEY		LL60.6HL			с	Fri 5 Sep 2008 at 11:06 am		Matthew Dean	
C01168	MIKEBURKE	CAERNARFON	GWYNEDD	LL554AF	01286 671305,		с	Fri 5 Sep 2008 at 11:06 am		John Roberts	
C01564	MIKE BARRY	COALBROOKD ALE	IRONBRIDGE	TF8 7DW	07966 650599,		с	Fri 5 Sep 2008 at 11:06 am		Kirsty Sinclaire	
C02313	MIKE COCHRANE	HOLYHEAD	YNYS MON		07890 900513,		С	Fri 5 Sep 2008 at 11:06 am		Peter Williams	
C02335	MIKE CLARKE	YNYS MON		LL65 3AL	01407 740574,		C	Fri 5 Sep 2008 at 11:06 am		Michael Kennedy	
C02926	MIKE DAVIES 005	TELFORD	SHROPSHIRE	TF3 2NH			с	Fri 5 Sep 2008 at 11:06 am		John Roberts	
C03280	MIKE DE ROSA LTD	GWYNEDD		LL535ES			с	Fri 5 Sep 2008 at 11:06 am		Michael Kennedy	

O2 Select the account that your contact belongs to so it highlights green and then select **CRM**.

03 Select **Contacts**, from the left hand side menu.



04

Select **View** next to the contact's name who you would like to change the preferences for.

MIKE BENNETT	6 sales-i CRM		Roll up to Parent Account:
(C00754)	CONTACTS (1)		Sort order Name: A to Z Add new contact
Customer Details			\bigcirc
Contacts	Ms Heather Watt	Phone: Email:	View Make default contact
Call History Notes			Tags: Add Tag
Documents			
Customer Potential			
Opportunities			
Customer Credit Information			
Key Facts			
HDP			
checkpoint keypoints			
ryedale			

MIKE	Sumame:			Address 2:	BARNTON
BENNETT (C00754)	Preferred name:			Address 3:	
	Full Name: Ms Heath	her Watt		Address 4:	
Customer Details	Position:			City/Town:	NORTHWICH
Contacts	Department:			State/County:	CHESHIRE
Call History Notes	Office:			ZIP/Post Code:	CW8 4SL
Documents	Home phone:			Country:	
Customer Potential	Business phone:				
Opportunities	Mobile:				
Customer Credit	Fax number:				
Information	Email preferences:	 Unspecified 	Opt-out	 Opt-in 	
Key Facts	Post preferences:	 Unspecified 	Opt-out	Opt-in	
ндр	Phone preferences:	 Unspecified 	Opt-out	Opt-in	
checkpoint keypoints	SMS preferences:	 Unspecified 	Opt-out	Opt-in	/
ryedale	Contaco.				

05 Scroll down to see the contact's communication preferences and select your desired option e.g. Email Preferences.

Select whether to opt them in or out of this communication or leave as unspecified.

06

Finally, scroll back up and select **Update**, in the top right hand corner.

