

HOW TO OPT A CONTACT IN OR OUT OF COMMUNICATIONS

This guide will show you how to opt a contact in or out of email, sms, telephone or mail communications as required when using the sales-i Apple app.

01

Once logged into sales-i, tap the **Quick search box** and type the name of the account that your contact is associated with.



NO SIM .	16:04	8% 🛄			
〈 Accounts	Accounts	Q			
Q Filter search	results				
Search results	for 'Mike'				
A00311	Albert Mike Auto Super Stores				
	604 2nd Ave, Ridgeland, SC	c, 29936 >			
Acc Type: Customer					
A04464	Garcia,	Mike A			
	1804 Staples Mill Rd, Richmond, VA	, 23230 >			
Acc Type: Customer					
A07348	Mcintyre, Mi	ke Esq			
	6126 S Main, West Millgrove, O⊦	1, 43467 >			
Acc Type: Customer					
A07537	Mikes Auto Bo	dy			
agazine	St, New Orleans, LA, 70	130 >)			
Acc Type: Custom					
A07538	Mikes Auto Body 8	& Glass			

02 Select the account that your contact belongs to.

03

Tap **Contacts**, from the Actions section.



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〈 Parent Account	Contacts	+
	Accou	nt roll up
Mikes Auto Body	(A07537)	
Billy Clubb		
Loverde Keenan		



Tap the correct contact who you would

like to opt in or out of communications.

 $\mathbf{04}$

05 Next, tap the **pencil icon** to take you to the contact edit screen.

Finally, scroll to Mail Preferences and tap an option e.g. Email Preferences, to select whether they to opt them in or out of communications via this channel e.g. Email. Once you have updated their preferences tap **Save**, in the top right hand corner.

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〈 Contacts	Add Contact	[↓]	Save	
Additional Details				
Mail Preferences				
Email Preferences		0	Opt-Out	
Post Preferences		Opt-Out		
Phone Preferences		Unspecified		
SMS Preferences		Unspecified		
Contact Informatio	วท		~	
Authority:			>	
			đ.	



06

support@sales-i.com

Main Contact