
Salesforce

Contacts

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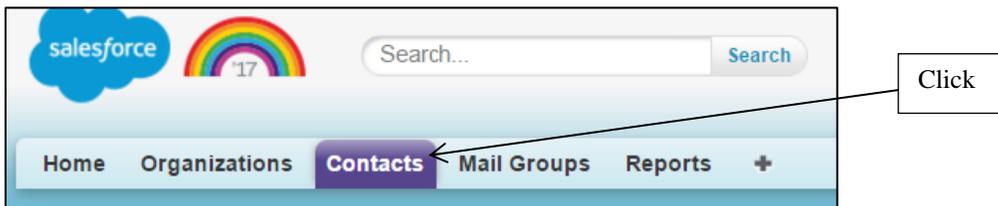
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1 Overview

Each county's contacts that were stored in the Extension Database are now visible in Salesforce. Contacts can easily be found through the search feature or by viewing the Contacts list for your county. This document contains step-by-step help on viewing, adding, editing, and deleting contacts in Salesforce.

2 View Contacts

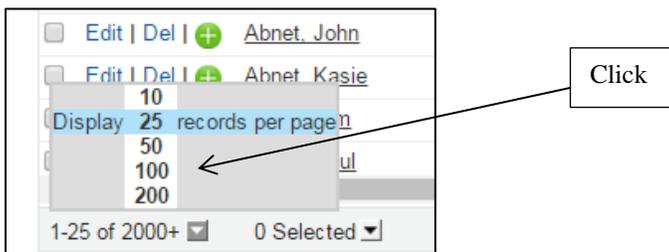
1. Log in to your Salesforce account, and click the **Contacts** tab from the top menu.



2. Select the view for your county's contacts from the **View** drop-down, and then click **Go**.



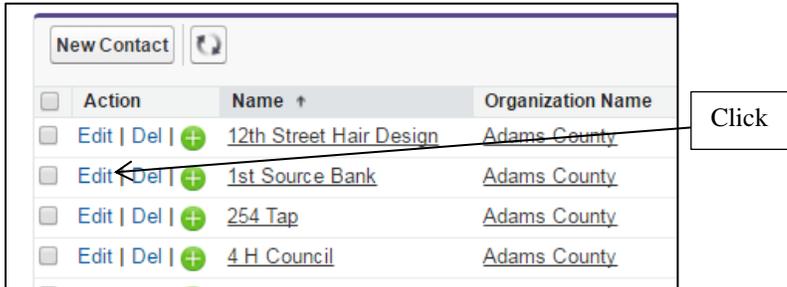
3. You will then see a list of your contacts. You can view a maximum of 200 contacts per page. Select the arrow at the bottom of the list to change how many records to view per page.



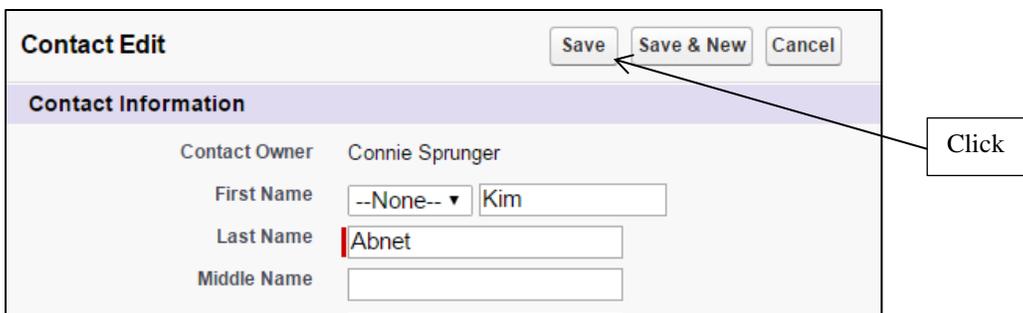
4. You can then view any contact by clicking on the name of the contact.

3 Edit or Delete a Contact

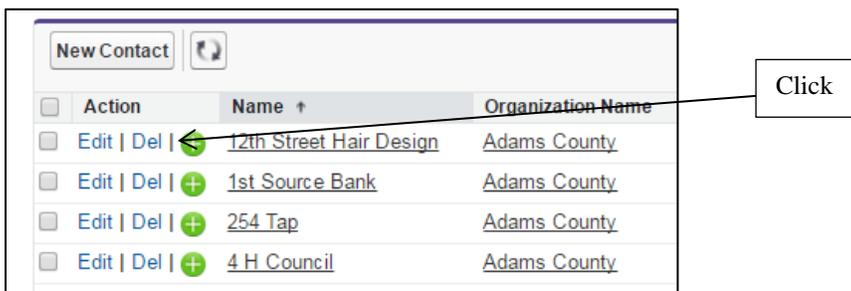
1. While in your Contacts list, you can edit any of the information for a contact by clicking the **Edit** link next to the contact.



2. Edit any of the fields in each section, such as **Email**, **Phone**, and **Mailing Street**.
3. Click **Save** after making any changes.

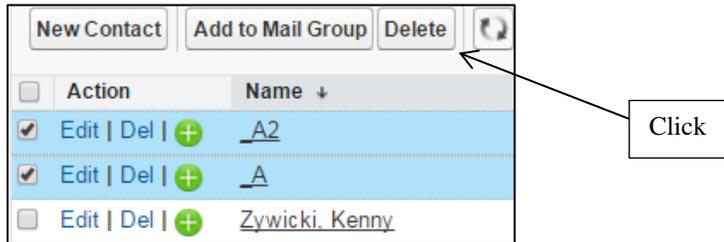


4. Back in the contact list, click the **Del** button to remove any contact.



5. Click **Yes** to confirm that you want to delete that contact.
6. Delete multiple contacts at once by selecting the checkbox next to each contact you want to remove.

7. Click the **Delete** button at the top of the list.

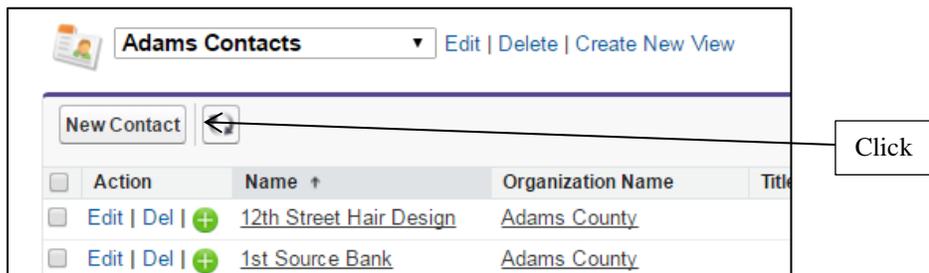


8. Click **OK** to verify you want to remove those multiple files, and then all of the files you selected will be fully deleted.

4 Add a New Contact

If you cannot locate a contact, then you may need to add a new contact. Always search for any contact before you add it.

1. Click the **New Contact** button in your contact list.



2. Fill out any info for the new contact.

Note: The **Last Name** and **Organization Name** fields are the only required fields.

3. Enter in your county's name in the **Organization Name** field. Make sure it includes the county name followed by "county." For example, "Johnson County."
4. You can also locate your county by clicking on the magnifying glass icon next to the field.
5. Click the **Save** button to add the new contact.

Note: You can click **Save & New** if you want to continue adding new contacts.