

Entering Contacts

Financial, Marketing, Technical

What Are Contacts?

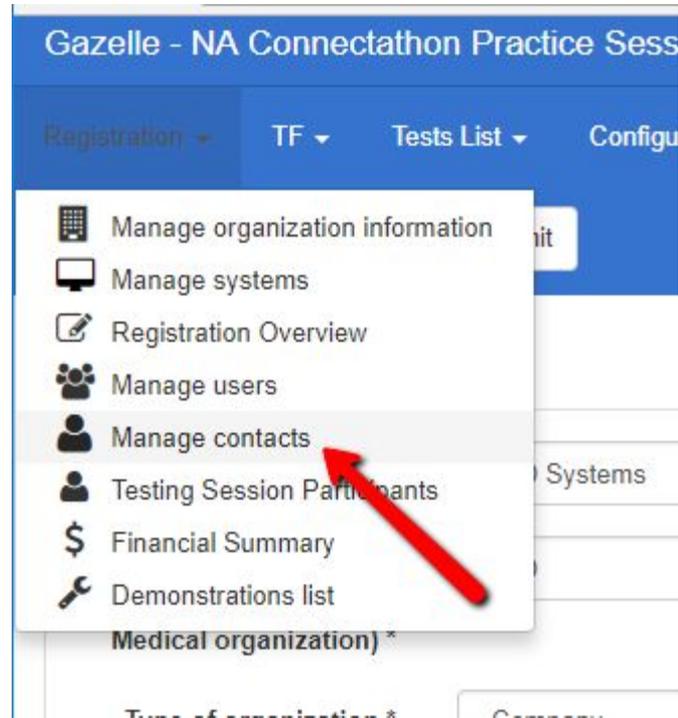
1. Gazelle manages contact information so that the Connectathon sponsors can reach out for help. These are:
 - a. Financial / Billing
 - b. Marketing
 - c. Technical
2. When you entered organization demographics, you entered the contact information for the Financial contact.
3. We need information for the other two categories.
4. Gazelle will allow you to designate one person with different responsibilities.
 - a. One person can be both the Financial and Marketing contact, or ...
 - b. One person can be both Marketing and Technical, or

Can Contacts Login to Gazelle?

1. No
2. The contact information you enter only allows Gazelle to keep a record of address, phone number, etc.
3. It does not create a login account for any contact person.
 - a. Many times the contact person (e.g., Financial) may never login to Gazelle. We do not automatically create accounts that will likely be unused.
4. If anyone on the contact list wants an account, they can add that separately.

Get Started

Select Registratio -> Manage contacts



Gazelle With a Single Contact

Contacts management

IHE may need to contact your organization for questions concerning financial, technical or commercial purposes. In order to help us contacting the right person, you are asked to provide us some extra contacts.

Please provide us with the information to contact one or many technical and marketing managers. If some persons have both functions you can give them the both.

Finally, keep in mind that creating a contact does not create an account for the given person.

Add a contact

Last name ▲	First name ▲	Email ▲	Phone	Cell	Fax	Marketing	Billing	Technical	Action
<input type="text"/>	<input type="text"/>	<input type="text"/>							
Blair	Stan	stan.blair@bcd-systems.ai	314-555-0000			false	true		  



Gazelle With a Single Contact

1. Select the pencil icon to edit that contact information
2. Note that he is already listed as the Billing contact

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<input type="text"/>	<input type="text"/>	<input type="text"/>							
Blair	Stan	stan.blair@bcd-systems.ai	314-555-0000			false	true		  



Add Marketing Responsibilities

1. Enable the Marketing checkbox (right)
2. Save
3. He is now marketing (below)

Technical

Marketing

Financial

Primary Technical



Last name ▲	First name ▲	Email ▲	Phone	Cell	Fax	Marketing	Billing	Technical	Action
Blair	Stan	stan.blair@bcd-systems.ai	314-555-0000			true	true		  



Add a Contact: Demographics and Responsibilities

1. From the contact page, select “Add a contact”
2. Fill in the demographics
3. Enable checkboxes for responsibilities
4. Ignore the difference between Technical and Primary Technical for now
5. Do not Save yet

Contact information	
Organization Name	BCD Systems
First name *	<input type="text" value="William"/>
Last name *	<input type="text" value="Emerson"/>
Email *	<input type="text" value="william.emerson@bcd-systems.ai"/>
Phone *	<input type="text" value="314-555-9999"/>
Title	<input type="text" value="CTO"/>
Cell Phone	<input type="text"/>
Fax	<input type="text"/>
Technical	<input checked="" type="checkbox"/>
Marketing	<input type="checkbox"/>
Financial	<input type="checkbox"/>
Primary Technical	<input checked="" type="checkbox"/>

Associate Address With New Contact

1. At this point, Gazelle has one mailing address for your organization
 - a. Gazelle associates that address with the new contact
2. If that address is wrong, activate the control to add a new address

The screenshot displays two sections of an address management interface. The top section, titled "Address information", shows a "Selected Address" with the following details:

Address	314 West Jackson
City	My City
State	MD
Zip Code	61234
Country	UNITED STATES 

The bottom section, also titled "Address information", shows the same address details. To the right of the address information is a "Select" button, a pencil icon for editing, and a trash can icon for deletion. A red arrow points to the "Select" button. Below this section is a link that reads "+ Click here to add a new address", with a red arrow pointing to it.

Create a New Address and Save It

1. Save the address, not the contact

Address information

Edit an address for your organization...

Please use this form in order to edit address information, entering fields below.

Address *

Address line 2

City *

State

Zip Code

Country *



Associate New Address With Contact

1. The act of creating the new address does not automatically associate it with the contact you are creating.
2. Activate the select button to do that.
3. Left: Before, Right: After

Address information

Selected Address

Address	314 West Jackson
City	My City
State	MD
Zip Code	61234
Country	UNITED STATES 

Address information

Address	314 West Jackson	Select 
City	My City	
State	MD	
Zip Code	61234	
Country	UNITED STATES 	

Address	615 Cermak	Select 
City	Davenport	
State	IL	
Zip Code	67123	
Country	UNITED STATES 	

[Click here to add a new address](#)

Address information

Selected Address

Address	615 Cermak
City	Davenport
State	IL
Zip Code	67123
Country	UNITED STATES 

Address information

Address	314 West Jackson	Select 
City	My City	
State	MD	
Zip Code	61234	
Country	UNITED STATES 	

Address information

Address	615 Cermak	Select 
City	Davenport	
State	IL	
Zip Code	67123	
Country	UNITED STATES 	

Now Save the Contact

Technical Contact vs Primary Technical Contact

1. Primary Technical Contact is the person who will show up in the generated contract with that title.
2. This is the person that Connectathon managers will likely contact in the event of questions.
3. Feel free to add other Technical Contacts if those will help sponsors or Connectathon managers.