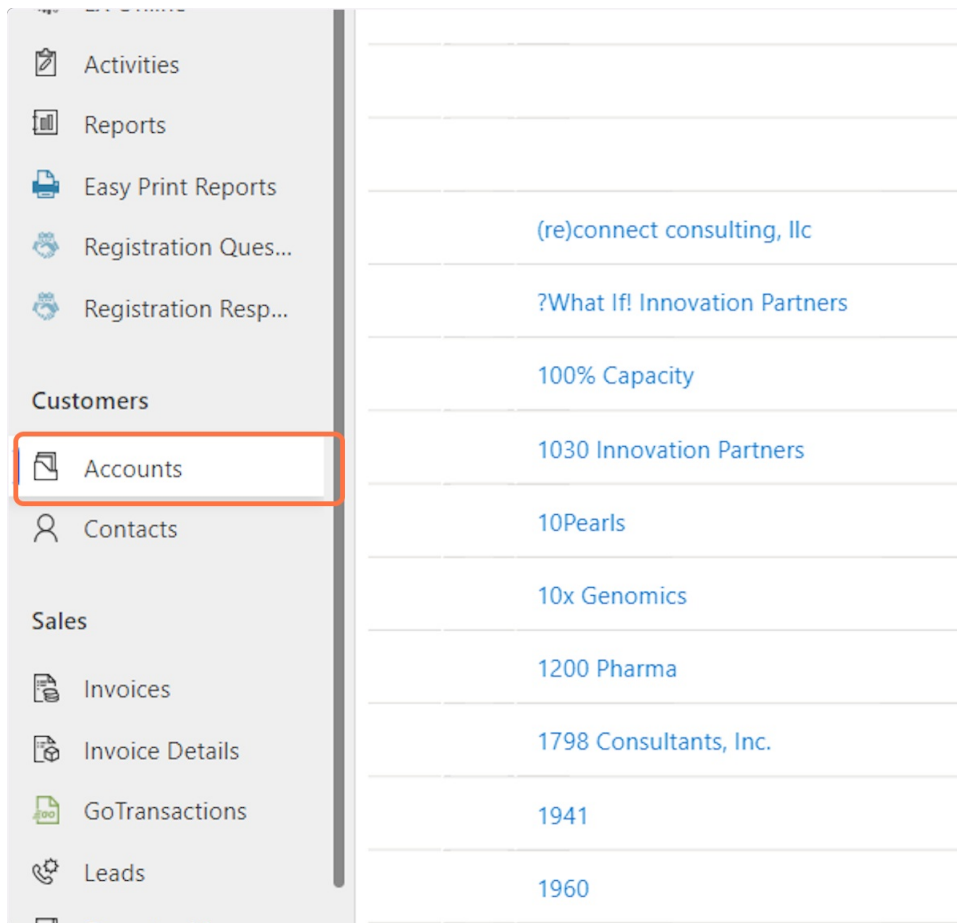


# How to add a Primary, Secondary, or Third Contact to an HBA account

Last Modified on 10/16/2024 9:30 am EDT

## 1. Click On Accounts

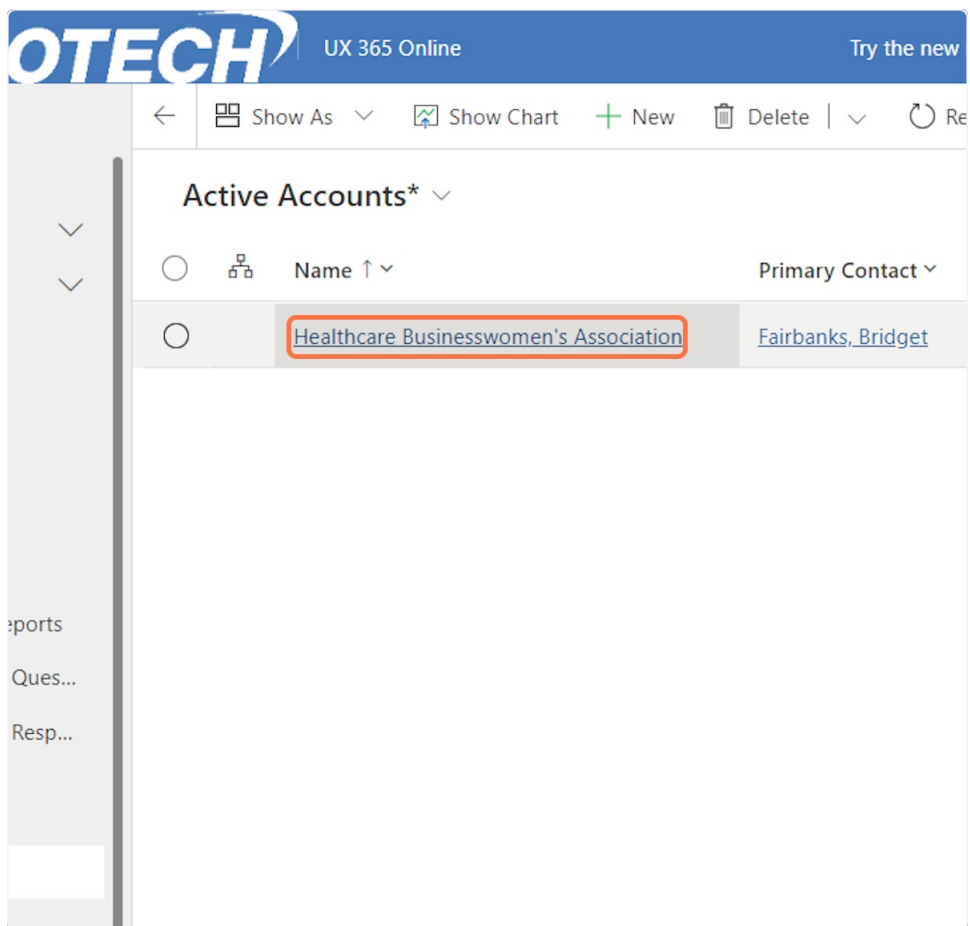


## 2. Type In The Name Of The Company

The screenshot shows a software interface with a blue header bar containing icons for search, insights, add, filter, settings, help, and a user profile. Below the header, there's a section with 'Visualize this view' and a 'Share' button. A search filter 'healthcare bus' is applied, highlighted by a red box. Below the filter, a table displays data with columns: 'Main Ph...', 'Address...', and 'Parent Acco'. The table lists five entries: '99988877...' (City1), 'Skokie', 'Lexington', 'Lexington', and 'Chicago'.

Main Ph...	Address...	Parent Acco
99988877...	City1	
	Skokie	
	Lexington	
	Lexington	
	Chicago	

### 3. Click On The Company



4. In The Primary, Secondary Or Third Contact Field Type The Name Of The Person You Need To Add.

5. Select The Person's Contact Record From The Option Menu

	<input type="text" value="fairbanks, br"/>	
	<div>Contacts<div>Recent records</div></div>	
contact	<div> <b>Fairbanks, Bridget</b> glennadurham1958@gmail.com</div>	
ponsor of	<div> <b>Fairbanks, Bridget</b> hfairbanks17@gmail.com</div>	
CP	<div> <b>Fairbanks, Bridget</b> bfairbanks@hbanet.org</div>	
(use ear)	<div><div> New Contact</div><div>Advanced lookup</div></div>	
Type	---	
ugh	10/31/2022	
l (Only	---	

6. Click On Save

**ROTECH** UX 365 Online

← ↗ **Save** ↻ Save & Close + New

**HB** **Healthcare Businesswomen's Association**  
Account · CP - Data Entry ▾

Healthcare Businesswomen's Association 202415  
Name Account

**Company & Membership Info** Addresses


---


Account Information

Name \* Healthcare Business



Nickname HBA

7. Click On The Name Of The Person You Just Added To Enter Their Contact Record.

Manager  
aff)  Gademy, Leena

Contact  Fairbanks, Bridget


ry Contact ---

ntact  Fairbanks, Bridget X 



g Contact

e Sponsor of

on of CP ---



**Fairbanks, Bridget**  
Customer Experience Manager  
Healthcare Businesswomen's Assoc


 Send email  ...



8. Click On More Tabs

org chart    ⋮    Share    📄

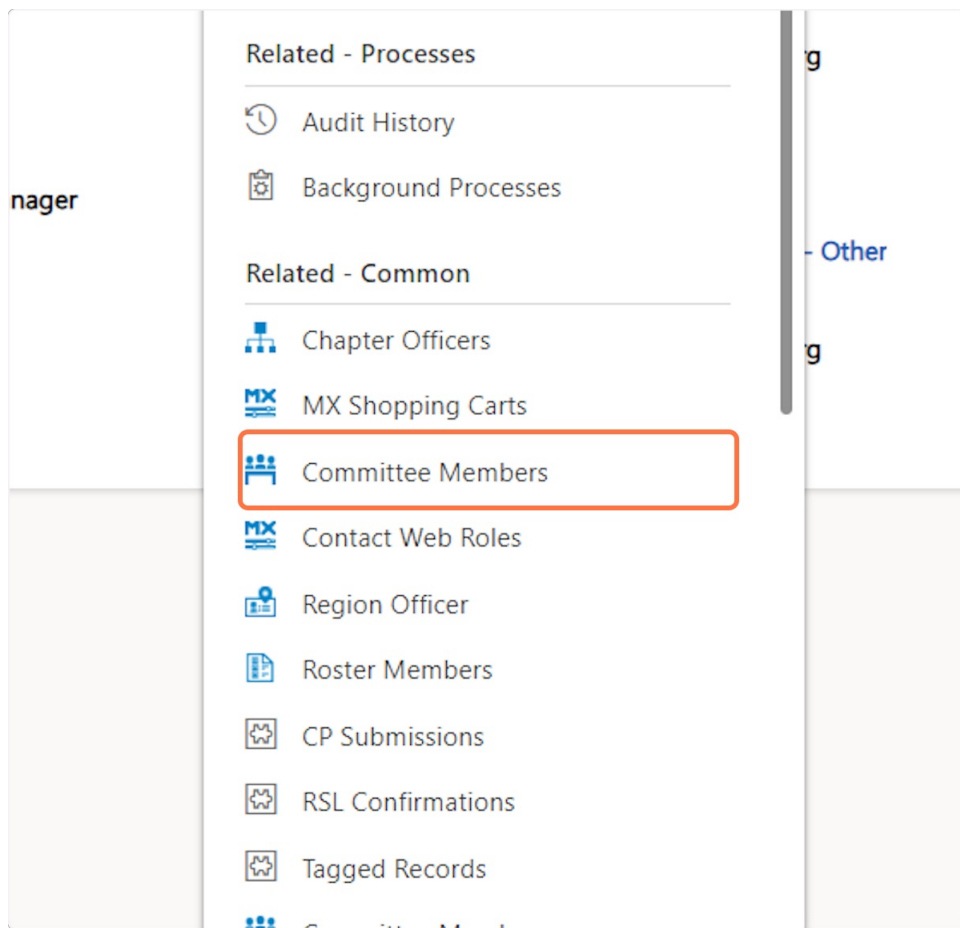
<b>Member</b> Price List	<b>12/31/2098</b> Expiration Date	<b>0.00</b> Engagement Points	▼
-----------------------------	--------------------------------------	----------------------------------	---

ences    Communications    **⋮**

 Healthcare Businesswomen's Asso...

SS     +1    973-575-0606 ext. 0    

9. Click On Committee Members



10. Click On New Committee Member



TECH

UX 365 Online

Try the new

←

↗

Save

Save & Close

+ New

Address Validation

FB

Fairbanks, Bridget - Saved

1005167

Contact · HBA Information

Contact I

General

Default Billing Information

Address Information

Details

Show Chart

+ New Committee Mem...

Refresh

Flow

Committee Member Associated View

Member ↑

Committee

Title

Fairbanks, Bridget

Voices of Tomorrow AG

Committee

Fairbanks, Bridget

Women of Color AG

Committee

Fairbanks, Bridget

Leena Test

Volunteer

Fairbanks, Bridget

Leena Test

Volunteer

Fairbanks, Bridget

Committee members

Ambassado

11. Type "Corporate Partners"

Save
 Save & Close
 New
 Flow

## New Committee Member - Unsaved

Committee Member · HBA Information ▾

Committee Member
 Administration
 Additional
 Notes

---

Contact	*  Fairbanks, Bridget	Title
Committee	* <input type="text" value="corporate"/>	Title Sequence
Contact's Company	<div>Committees</div> <div> <div> <b>Corporate</b> Partners CPs           </div> <div> <b>Corporate</b> Relations Corp Rel           </div> <div> <b>Corporate</b> Relations - GPH CORPREL-GPH           </div> </div>	
Committee Member Type		
Term Begins	*  New Committee	Advanced lookup

## 12. Select The Corporate Partners" Committee Option

Save
 Save & Close
 New
 Flow

## New Committee Member - Unsaved

Committee Member · HBA Information ▾

Committee Member Administration Additional Notes

Contact	*  Fairbanks, Bridget	Title	* ---
Committee	* <input type="text" value="corporate"/>	Title Sequence	---
Contact's Company	<div>Committees</div> <div> <div> <b>Corporate Partners</b> CPs           </div> <div> <b>Corporate Relations</b> Corp Rel           </div> <div> <b>Corporate Relations - GPH</b> CORPREL-GPH           </div> </div>		
Committee Member Type	<div> <b>Corporate Partners</b> CPs           </div> <div> <b>Corporate Relations</b> Corp Rel           </div> <div> <b>Corporate Relations - GPH</b> CORPREL-GPH           </div>		
Term Begins	*  New Committee	Advanced lookup	* ---



Comments  
 ---

13. In The Title Field Type "Corp Partner - Company Contact"

nce

\* corp partner - company contact

Titles

-  Corp Partner - Company Contact - Additional 90
-  Corp Partner - Company Contact - Primary 00

14. Select Either The Primary Contact, Secondary Contact Or Additional Contact Depending On What Their Role Is.




\* corp partner - company contact

ence

Status

s \*

Titles

-  **Corp Partner - Company Contact - Additional**  
90
-  **Corp Partner - Company Contact - Primary**  
90
-  **Corp Partner - Company Contact - Secondary**  
00

+ New Title      Advanced lookup

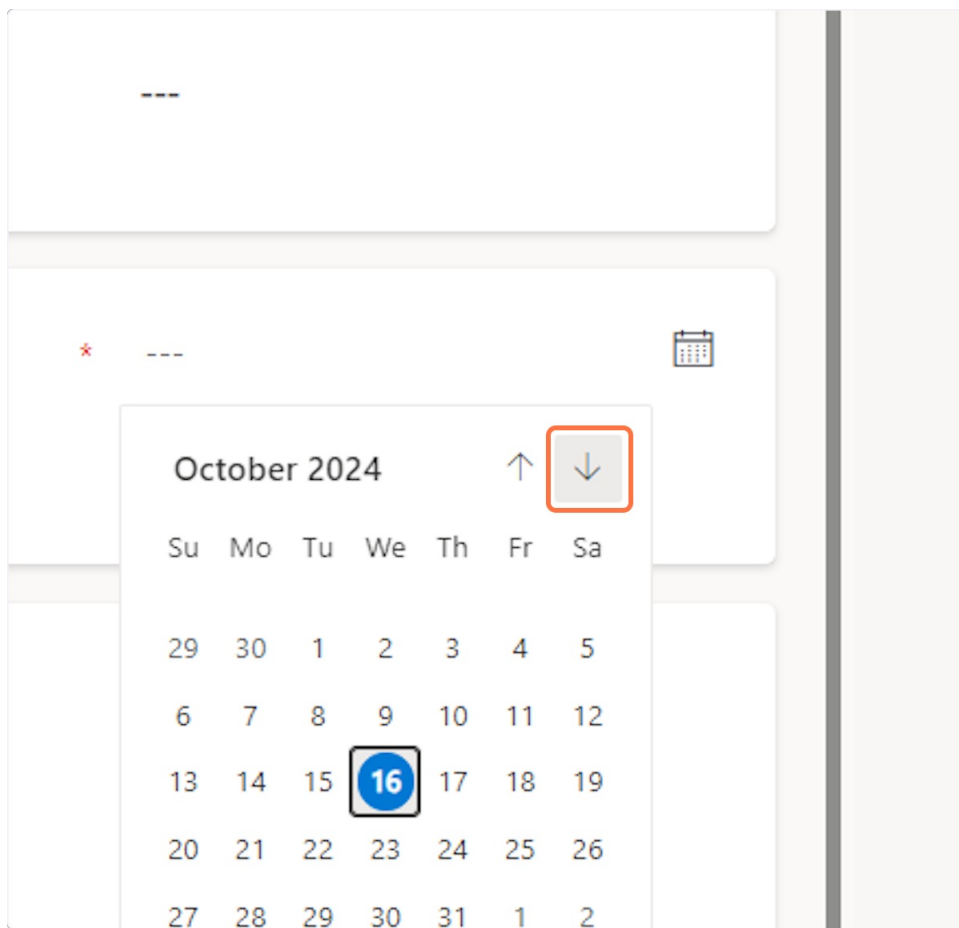
15. Select Their Term Start Date

Committee Member Type	Member																																											
Term Begins	* ---	Term Ends																																										
Comments	<div> <div>October 2024</div> <div> <div>↑</div> <div>↓</div> </div> <table border="1"> <thead> <tr> <th>Su</th> <th>Mo</th> <th>Tu</th> <th>We</th> <th>Th</th> <th>Fr</th> <th>Sa</th> </tr> </thead> <tbody> <tr> <td>29</td> <td>30</td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> </tr> <tr> <td>6</td> <td>7</td> <td>8</td> <td>9</td> <td>10</td> <td>11</td> <td>12</td> </tr> <tr> <td>13</td> <td>14</td> <td>15</td> <td>16</td> <td>17</td> <td>18</td> <td>19</td> </tr> <tr> <td>20</td> <td>21</td> <td>22</td> <td>23</td> <td>24</td> <td>25</td> <td>26</td> </tr> <tr> <td>27</td> <td>28</td> <td>29</td> <td>30</td> <td>31</td> <td>1</td> <td>2</td> </tr> </tbody> </table> </div>		Su	Mo	Tu	We	Th	Fr	Sa	29	30	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2
Su	Mo	Tu	We	Th	Fr	Sa																																						
29	30	1	2	3	4	5																																						
6	7	8	9	10	11	12																																						
13	14	15	16	17	18	19																																						
20	21	22	23	24	25	26																																						
27	28	29	30	31	1	2																																						
Voting Member (flag to add an asterisk after non-voting board member's name on website)																																												
Yes																																												
Show Title (for display online)																																												

## 16. Select Their Term End Date

The committee **term** should end 30 days after the current CP term ends.

Example: Dynavax expires 12/31/24, so I gave the key contact an additional 30 days on the committee/portal access to basically get them through the end of the CP's 30-day grace period.





17. Click On Save

**ROTECH** UX 365 Online

← ↗ **Save** ↶ Save & Close + New

**New Committee Member** - Unsaved  
Committee Member · HBA Information ▾

**Committee Member** Administration Add

Contact	*	 Fairbanks, Bridge
Committee	*	 Corporate Partner
Contact's Company		---

18. Click On Additional



Microsoft Dynamics 365 Online Try the new look

Save Save & Close + New Deactivate Delete

Bridget - Saved

Member · HBA Information ▾

Member Administration **Additional** Notes Related ▾

* Fairbanks, Bridget	Title
* Corporate Partners	Title Sequence
Company	---

19. Ensure That The Field Titled "Corresponding Contact Web Role Record" Displays The Correct Primary, Secondary Or Third Contact Record.

TECH

UX 365 Online

Try the new look

←

📁

Save

Save & Close

New

Deactivate

Delete

Refresh

Check Access

Share

Fairbanks, Bridget - Saved

Committee Member - HBA Information

Committee Member Administration **Additional** Notes Related

Web

Corresponding contact web role record

Secondary Contact

×

Committee Member Comments

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20. Click Save & Close

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