

# Contact Management User Guide

Community Administrators  
May 11, 2020



This page is left blank intentionally.

## Contents

Revisions .....	1
Overview .....	1
Logging into the Membership Management Community .....	1
Contact Management.....	1
Creating Contacts and Assigning Roles .....	1
Assigning Roles to Existing Contacts .....	2
<i>Creating New Contacts and Assigning Roles</i> .....	4
Member Roles .....	5
Unassigned Member Roles .....	5
Contacts .....	5
Exporting Data .....	6
Create a Case.....	6

## Revisions

Current Revision

May 2020

- Removed reference to Contact Manager Attestation form. This form has been replaced with functionality in the Maintenance feature of the Membership Management Community.

## Overview

The Contact Management feature in the Membership Management Community was designed to make it easier for members to manage who is representing their company for various member-level roles at PJM. The new tool allows for easy maintenance of contacts and role assignments and a transparent and centralized process for improved data quality. It provides enhanced security by establishing Contact Managers. Authorized Contact Managers are responsible for creating contacts and assigning roles for their organization.

Full members are required to designate Contact Managers for their organization. To designate or revoke a contact manager, an officer, authorized representative, or maintenance manager for the member must use the Maintenance feature in the Membership Management Community.

### *Logging into the Membership Management Community*

Contact Managers can sign in by navigating to the Membership Management Community page on [pjm.com](http://pjm.com) and clicking **Sign In**: <http://pjm.com/markets-and-operations/etools/membership-management-community.aspx>

## Contact Management

The Contact Management functionality allows Contact Managers to create contacts, assign contacts to roles, and view the contacts and assignments for their member company. There are three tabs available: Member Roles, Unassigned Roles and Contacts. When logged into the Member Maintenance Community, click on the **Contact Management** tab.

- **Member Roles:** Displays contacts and their role assignments by company. Contact role assignments can be deleted or reassigned from this tab.
- **Unassigned Member Roles:** Displays roles that do not have contacts assigned to them.
- **Contacts:** Displays contact information by company. Available functionality on this tab includes editing contact information (phone numbers, titles, etc.), deleting all role assignments for a contact and removing the contact from your company.

### *Creating Contacts and Assigning Roles*

To create contacts and assign roles for your organization, click on the **Create & Assign** button.

## Assigning Roles to Existing Contacts

After clicking the **Create & Assign** button, search the contacts associated to your company or companies by email:

If the contact exists, it will be displayed in the search field.

1. Click on **View Contact**.
2. Click on **Select Role**.
3. Select the **member company** from the dropdown. Only those companies in which you are designated as a Contact Manager will be available:

\* Select Member

Voting Member 1

4. Select **roles** from the dropdown. One or more roles can be selected. Member role definitions are listed in the following document: <http://www.pjm.com/-/media/etools/membership-management-community/membership-management-role-definitions.ashx> :

\* Select Role(s)

Select one or more

5. After selecting one or more roles, either close the selection box or scroll to the bottom of the roles list and click on **Apply**.
6. Click on **Assign Roles**.
7. Select whether the contact is the primary or alternate for that role, then click on **Save**:

### Voting Member 1

Billing\*  Primary  Alternate

Credit\*  Primary  Alternate

NOTE: Roles designated with an "\*" require a primary contact and at least one alternate contact. If you are not able to select the Primary radio button, it means a primary contact has already been designated for that company or the contact you have selected is already assigned to that role. If you are not able to select an alternate, it means the maximum number of alternate contacts for that role have been designated or the contact you have selected is already assigned to that role.

## Creating New Contacts and Assigning Roles

After selecting the Create & Assign button:

1. Select **Create Contact**.

Update form with the following information:

- First name\*
- Last name\*
- Title\*
- Employer, if different from member
- Individual email\*
- Group email (optional)
- Preferred email indicator (required if both individual and group emails are provided)
- Phone number\*
- Phone type\* (cell, office, other)
- Alternate phone number
- Alternate phone type (cell, office, other)
- Comments

NOTE: Fields designated with an "\*" are required.

2. Click on **Select Role**.
3. Select the member company from the dropdown. Only those companies in which you are designated as a Contact Manager will be available:

\* Select Member

Voting Member 1

4. Select Roles from the dropdown. One or more roles can be selected. Member Role Definitions are listed in the following document: <http://www.pjm.com/-/media/etools/membership-management-community/membership-management-role-definitions.ashx> :

\* Select Role(s)

Select one or more

5. After selecting one or more roles, either close the selection box or scroll to the bottom of the roles list and click on **Apply**.
6. Click on **Assign Role(s)**.
7. Select whether the contact is the primary or alternate for that role then click **Save**:

### Voting Member 1

Billing\*  Primary  Alternate

Credit\*  Primary  Alternate

NOTE: Roles designated with an “\*” require a primary contact and at least one alternate contact. If you are not able to select the Primary radio button, it means a primary contact has already been designated for that company or the contact you have selected is already assigned to that role. If you are not able to select an alternate, it means the maximum number of alternate contacts for that role have been designated or the contact you have selected is already assigned to that role.

### Member Roles

The Member Roles tab displays the role assignments for contacts with associated member company name, role and type. Each column is searchable and sortable. Under the Actions column, the Contact Manager has the ability to edit or delete a contact’s role assignment. If a contact no longer works for your company, please use the delete functionality on the Contacts screen to remove all role assignments and indicate the contact is no longer associated with your company.

Search	<input type="text" value="Search"/>
Edit	
Delete	
Sort	

### Unassigned Member Roles

The Unassigned Member Roles tab displays the member companies with associated roles and types for which a contact has not yet been designated. Roles with “\*” are required to be assigned a contact. See the Creating Contacts and Assigned Roles section for instructions.

### Contacts

The Contacts tab displays the contacts that have already been associated to your company in the Contact Management system. This tab displays the contact name, represented member company, employer (if different from member), title, email address and phone number. If a group email was selected as the preferred email for a contact, the group email will be displayed. Additional data, including alternate phone and comments, are available by selecting **Edit** or using the export functionality.

Each column is sortable. Columns that display a search box are searchable. Columns that display

▼

are filterable. Under the Actions column, the Contact Manager has the ability to edit contact information or delete all role assignments for the selected contact. Rows that do not contain the Delete icon cannot be deleted as they contain the designated Contact Manager, Officer, Authorized Representative, or Maintenance Manager for the company. Please refer to the Membership Maintenance Community tools page for information on revoking these roles, <https://www.pjm.com/markets-and-operations/etools/membership-management-community.aspx>.

Edits to the first name and individual email fields are not allowed in the Contacts tab. If you require a change to the individual email or first name, please use the Create a Case link to request the change.

Deleting all role assignments and the contact:

1. Click on [Delete](#).
2. Click on [Remove](#).
3. If the contact no longer works for your company, when asked if the person is still associated with the member company, click on [No](#).
4. If the contact still works for your company, click on [Yes](#). The contact will continue to display in the Contacts tab and be available for assigning roles.

To remove a contact from a single role, click on the [Delete](#) icon on the Member Role tab associated with the contact.

## ***Exporting Data***

To export an Excel spreadsheet containing a list of all member roles, unassigned member roles and/or contacts, select [Export: CSV](#) on the associated tab for the data to be exported.

NOTE: When exporting Contact data, the spreadsheet will contain all details associated with the contact, including fields that are not displayed on the Contact tab.

## ***Create a Case***

If you have questions or issues regarding the Contact Management tool, please use the [Create a Case](#) link to submit the item to PJM.