Branch Contacts

The Branch Contact list contains the persons who are responsible for responding to events and managing the Branch's data. Branches may have three types of contacts added to their Contact Lists in Manitou: Contact Persons (Individuals on this Branch alone), Global Keyholders (Linked persons), and other Branches.

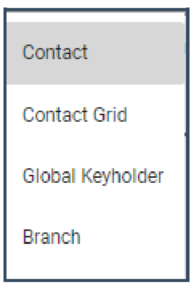
The Branch Contact List contains three cards: Contacts, Attentions, and Details.

Contacts Card

The contacts card is where you add the individuals that respond for or manage the Branch data.

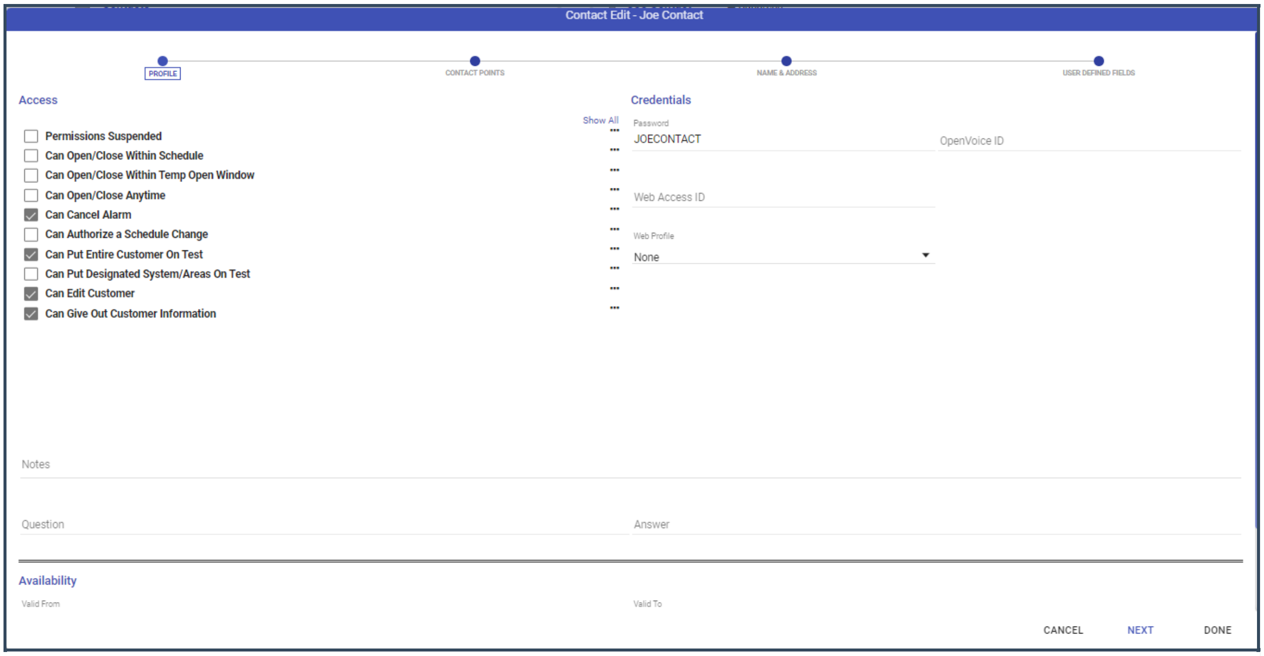
Adding a Contact

Click the Plus sign () and select the type of contact to Add.



Contact Add

1. Enter the **Name** of the Contact - Be sure to enter First Name then Last Name as you would have someone read it.
2. Select the **Type** - Keyholder is the default. Keep it as Keyholder unless specified by your organization.
3. Verify the **Country**, **Language,** and **Time Zone**.
4. Click **Done**
5. This launches the **Advanced Edit.**



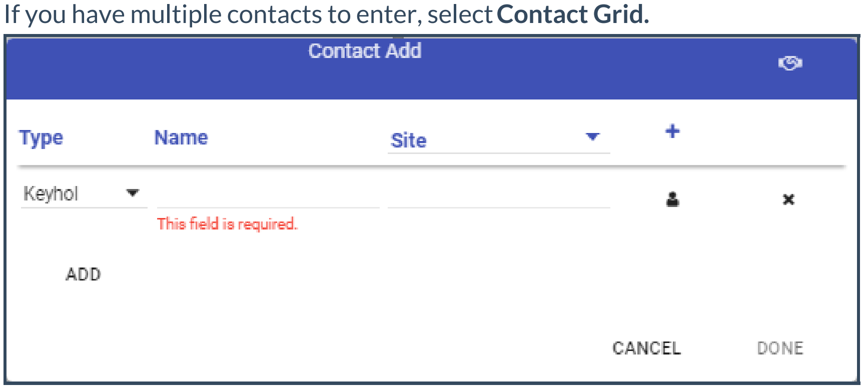
Enter any applicable data such as:

- **Contact Password**
- **Permissions** automatically load based on the data entered. You may update or change these at any time.
- **Web Access ID**
- **Notes**
- **Availability**

6. Click **Next** to enter the **Contact Points** (Phone number, email address, etc.)
7. Click **Next** to add the contact's **Name and Address**, if required.
8. Click **Next** to select or enter data into any contact-specific **User-defined** fields.
9. When all is entered as desired, click **Done**.
10. **Repeat** as required for all contacts, or use the **Contact Grid**.

Contact Grid

If you have multiple contacts to enter, select **Contact Grid.**



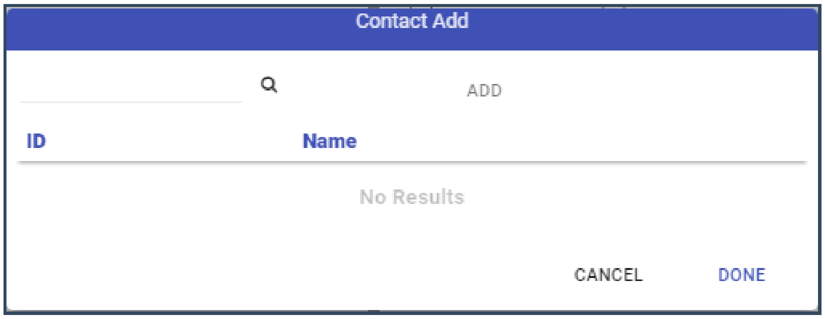
1. Click **Add**
2. Select the **Type**, if other than Keyholder.
3. Enter the **Name** of the first contact.
4. Select the **Contact Point Type** in the header and then enter the number. If the person(s) have multiple numbers, click the **plus sign** () to add more column contact type headers.

5. Click **Add** and repeat for all contacts
6. You may click the **Advanced Edit** to enter all contact details, as noted **above**.
7. When all are entered as needed, click **Done**.

Please note: Contacts are ordered based on the order entered into the system. If you would like to change the order of who is listed, please drag and rearrange.

Global Keyholder

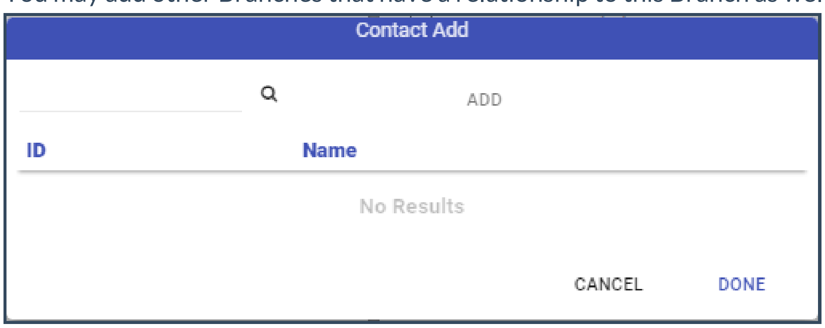
Global Keyholders are persons who are utilized on multiple accounts and reference a single Global Keyholder record for their details.



1. Within the Add **Global Keyholder** dialog, enter or **search for the Global Keyholder** you wish to add.
2. Once loaded Click **Add**.
3. Once Added Click **Done**.
4. **Repeat** as required for all applicable Global Keyholders.

Branch

You may add other Branches that have a relationship to this Branch as well.



1. Select **Branch.**
2. Within the **Branch** Add dialog enter or **search for the Branch** to Add.
3. Once loaded click **Add**.
4. Once Added Click **Done**.
5. **Repeat** as required for all Branches you wish to link to this Branch.

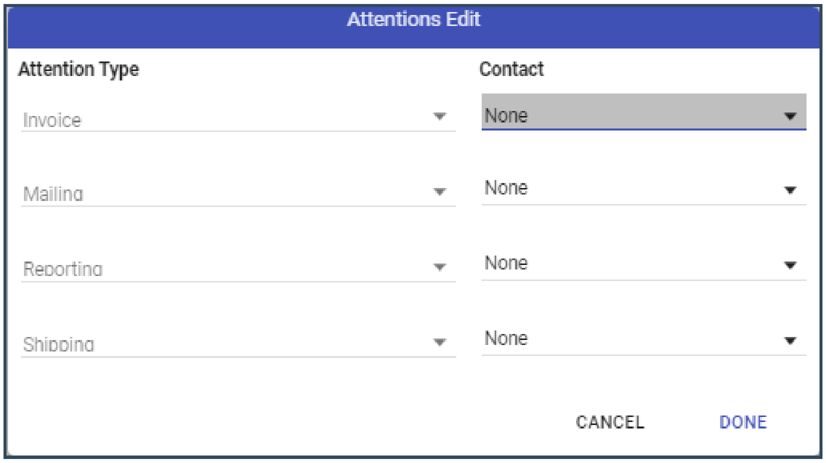
Once all contacts are entered as desired, Save () the record.

Attention Card

The Attention card is used only when printed items require attention to a specific person.

Adding an Attention

Click the pencil icon (✏) and select the person for the type of attention.



When entered as desired. Click Done.

Remember to click Save () to commit the information to the database.

Contact Details Card

The Contact Details card populates with the data entered for that contact upon selection of their contact within the Contacts Card.

You may click the pencil icon (✏) to edit the contact at any time. This launches the Advanced Edit dialog for that contact as above.