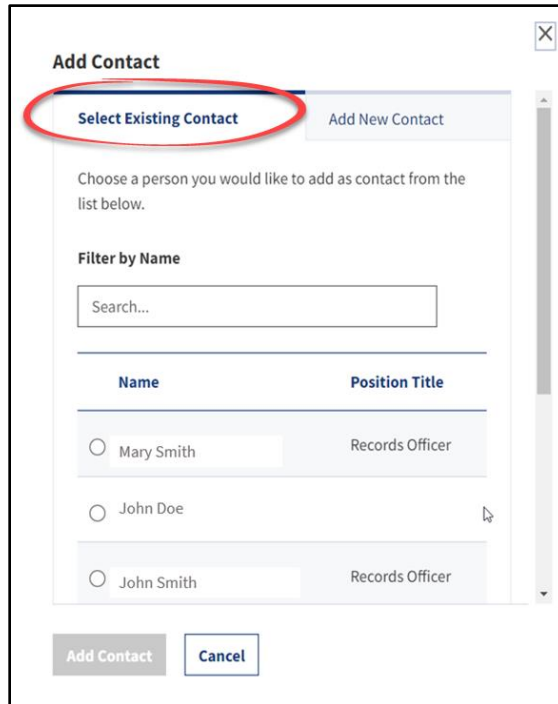


How to Change the Primary Contact for a Form

Select **Add Contact**. The **Select Existing Contact** tab displays.



The screenshot shows a dialog box titled "Add Contact" with a close button (X) in the top right corner. It features two tabs: "Select Existing Contact" (which is circled in red) and "Add New Contact". Below the tabs, there is a text prompt: "Choose a person you would like to add as contact from the list below." Underneath is a "Filter by Name" section with a search input field containing "Search...". A table lists three contacts:

Name	Position Title
<input type="radio"/> Mary Smith	Records Officer
<input type="radio"/> John Doe	
<input type="radio"/> John Smith	Records Officer

At the bottom of the dialog are two buttons: "Add Contact" and "Cancel".

Figure 1 Add Contact with Select Existing Contact Tab Circled and Displayed.

On the **Add Contact** screen,

1. Select the **person you want to add**.
2. Select **Yes** to the question: **Make this person the primary contact?**
3. Add **comments** in the **Comments** field (Optional).
4. Select **Add Contact**. The **Contact Information** tab displays the updated information.
5. Select **Next**. The **Items** tab appears.

If the correct **Primary Contact** is not selected during the adding process, delete the contact and repeat the steps to select an existing contact.

To Add a New Contact:

1. Select **Add Contact**. The **Select Existing Contact** tab displays.
2. Select the **Add New Contact** tab.

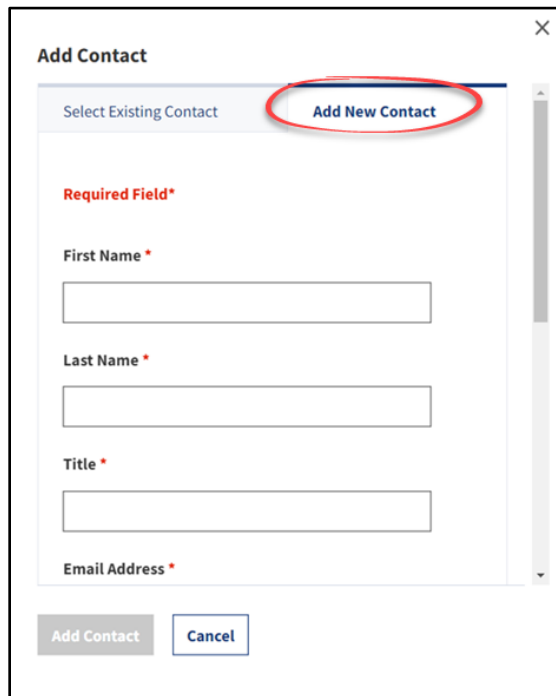
The image shows a software dialog box titled "Add Contact" with a close button (X) in the top right corner. At the top, there are two tabs: "Select Existing Contact" and "Add New Contact". The "Add New Contact" tab is highlighted with a red circle. Below the tabs, there is a section labeled "Required Field*" in red. This section contains four text input fields, each with a red asterisk indicating it is required: "First Name", "Last Name", "Title", and "Email Address". At the bottom of the dialog, there are two buttons: "Add Contact" (disabled) and "Cancel".

Figure 2 Add Contact with Add New Contact Tab Circled and Displayed.

1. Enter the **new contact's information**.
2. Reply **Yes** to the question: **Make this person the primary contact?**
3. Select **Add Contact**.
4. The **Contact Information** tab displays the updated information.
5. Select **Next**. The **Items** tab appears.