

Update Contact Store

Last Modified on 06/03/2024 2:26 am EDT

Note: This option is only available if you're working in an event connected to a Contact Store.

This Express Action lets you update or add records in the [Contact Store](#) (a master repository of contact records which you can connect to individual events).

It's especially important to run this Express Action after each event to add any new contacts who registered during that event. (It will also update any matching records, but won't delete contacts – you'll need to do that manually.)


To update the Contact Store:

- First, use the **Target Group** filter to search for attendees you want to be added/updated in the contact store based on their registration in this event. Press Apply with no search criteria to select all attendees, or search based on specific criteria.

Tip: Use the checkbox for **Only display records not linked to a Contact Store** to find *new* people – you may want to process these separately, perhaps giving them a different Contact Store Marketing Tag.

Update Contact Store

Selected Records

Target Group 

Only display records not linked to the Contact Store

<input checked="" type="checkbox"/>	ID	NAME ↓	ORGANIZATION
<input checked="" type="checkbox"/>	7	Smith, Geroge	
<input checked="" type="checkbox"/>	3	Jameson, Luke	
<input checked="" type="checkbox"/>	2	Jameson, Jeremy	
<input checked="" type="checkbox"/>	4	Jameson, James	
<input checked="" type="checkbox"/>	1	Danns, Paladin	
<input checked="" type="checkbox"/>	5	Barns, Patrick	

Total Recipients: 6

Add Marketing Tags

Marketing Tag

When the list is processed, people who are already in the Contact Store will either be updated (if there are new details) or skipped over (if there are no changes). This will happen whether or not you've checked the box to display only new records.

- Review the list and select/deselect as required.
- Perform the update by selecting **Create**.

If you like, you can apply a specific Contact Store Marketing Tag to these contacts before going ahead with the Update Contact Store Express Action. This lets you easily identify them later, for reporting purposes.

Note: You need to first set up your Contact Store Marketing Tags in the [Contact Store](#).

If you want to, you can apply CE Credits.

Enter the Course Description, Credit Type, Date, and Credits.

Note: You need to first have CE Courses enabled in your event, and set up these Contact Store Credit Types in the [Contact Store](#).
