



HOW TO AMEND CONTACTS ON THE MEMBER PORTAL



RESPONSIBLE
JEWELLERY
COUNCIL

01

CONTACT TYPES

Assigning the correct contact type ensures that you receive communication from the RJC that is relevant to you and your role.

Principle Contact:

Main contact for all RJC correspondence on important membership updates including certification status, newsletters, training, events and information on other engagement opportunities, as well as receiving Annual Relevant Sales requests, invoices, receipts, and payment reminders.

Invoicing Contact:

This contact is to receive Annual Relevant Sales requests, invoices, receipts, and payment reminders only.

General Comms Contact:

Receives general comms such as newsletters and event invitations.

CONTACT ROLE

Ensure one of your contacts is assigned as an **AGM* contact** in the '**contact role**' field to participate in the board election process. Each member may select no more than **one** contact to receive communication regarding board election nominations and/or voting.

The results are then announced at the
*Annual General Meeting (AGM).

02

To view and edit your contacts log onto the **member portal** 

and click **'Add Contacts'**.

To ensure you don't miss any RJC communications, we recommend having a minimum of **two principal contacts**, each with their own unique email address.

QUICK LINKS

 GET STARTED Break down your certification journey into manageable steps. START	 BRAND GUIDELINES Spread the word about responsible jewellery through our brand assets. READ	 LIBRARY Access toolkits, training, standards, guidance and marketing materials. SEARCH
 MARKETING TOOLS For certified members only: find and personalise marketing resources. SEARCH	 ADD CONTACTS Add marketing and finance contacts. ADD	 CERTIFICATES View and download your current and past membership certification. VIEW
 INVOICES View and manage your invoices. VIEW	 MY PROFILE See and manage your own contact information and profile. MANAGE	 COMPANY ACCOUNT Manage your company account and contact details. MANAGE

03

To add a new contact,
click on the **'add'** button.

To edit a contact,
click the **'pencil icon'** button.

HOME / ADD CONTACTS

+

ADD

	Name ↑	Email	Telephone	Job Title	Contact Type
	John Smith	john.smith@company.com		Sales Executive	Principal contact
	Jane Doe	jane.doe@company.com		Technician	Invoicing contact

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1

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10 items per page

1 - 12 of 12 items

04

ADDING A NEW CONTACT

The '**contact role**' field is where you assign your AGM contact, if you have already selected an AGM contact, please leave this field empty.

If the contact should have access to the portal, click '**save & send portal invite**' and they will receive an email with a link to register.

Otherwise, click '**create contact**'.

The screenshot shows the 'ADD CONTACTS' form with the following fields and buttons:

- First Name ***: Text input field.
- Last Name ***: Text input field.
- Job Title ***: Text input field.
- Contact Roles**: Dropdown menu (highlighted with a yellow box).
- Mobile Number**: Text input field.
- Telephone**: Text input field.
- Email ***: Text input field.
- Contact Type ***: Dropdown menu (with an information icon).
- Additional Contact Type (multiselect)**: Text input field.
- SAVE & SEND PORTAL INVITE**: Button (highlighted with a yellow box).
- CREATE CONTACT**: Button (highlighted with a yellow box).

Annotations from the text on the left point to the 'Contact Roles' field, the 'SAVE & SEND PORTAL INVITE' button, and the 'CREATE CONTACT' button.

05

EDITING
A CONTACT

To delete a contact, click
'make contact inactive'.

To update an existing contacts details,
update the relevant fields
and click **'submit changes'**.

The screenshot shows a 'View/Edit Contact' form with the following fields and controls:

- First Name ***: Input field containing 'John'. An orange box highlights this field and the 'SUBMIT CHANGES' button.
- Last Name ***: Input field containing 'Smith'.
- Job Title ***: Empty input field.
- Contact Roles**: Empty input field.
- Mobile Number**: Empty input field.
- Telephone**: Empty input field.
- Email ***: Input field containing 'john.smith@company.com'. An orange box highlights this field and the 'SUBMIT CHANGES' button.
- Contact Tags**: A dropdown menu showing 'Principal contact' with an information icon (i) to its right.
- Buttons**: Two buttons at the bottom: 'SUBMIT CHANGES' and 'MAKE CONTACT INACTIVE'. Both are highlighted with orange boxes and lines connecting them to the instructional text on the left.

The form is set against a background image of a hand writing on a notepad. At the bottom of the page, there is a pagination bar showing '1' of 1, '100' items per page, and '1 - 61 of 61 items'.



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