Add and Edit Contacts

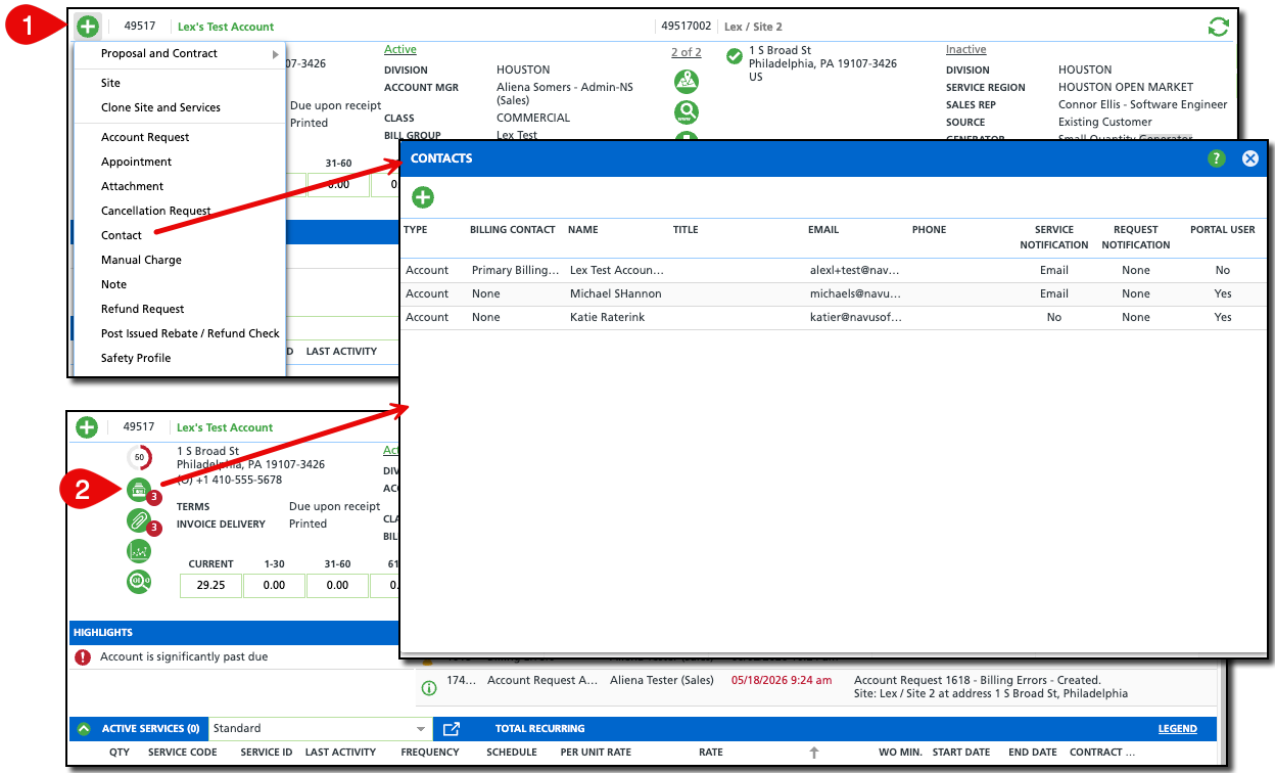
Last Modified on 09/24/2026 2:20 pm PDT

Pathway: *Accounts > Search > Accounts*

The **View Contacts** tool, accessible in the Account Details section of the customer service screen, provides users the ability to add and edit contacts associated with accounts and sites. Adding an account contact is essential to ensure efficient communication and accurate record-keeping.

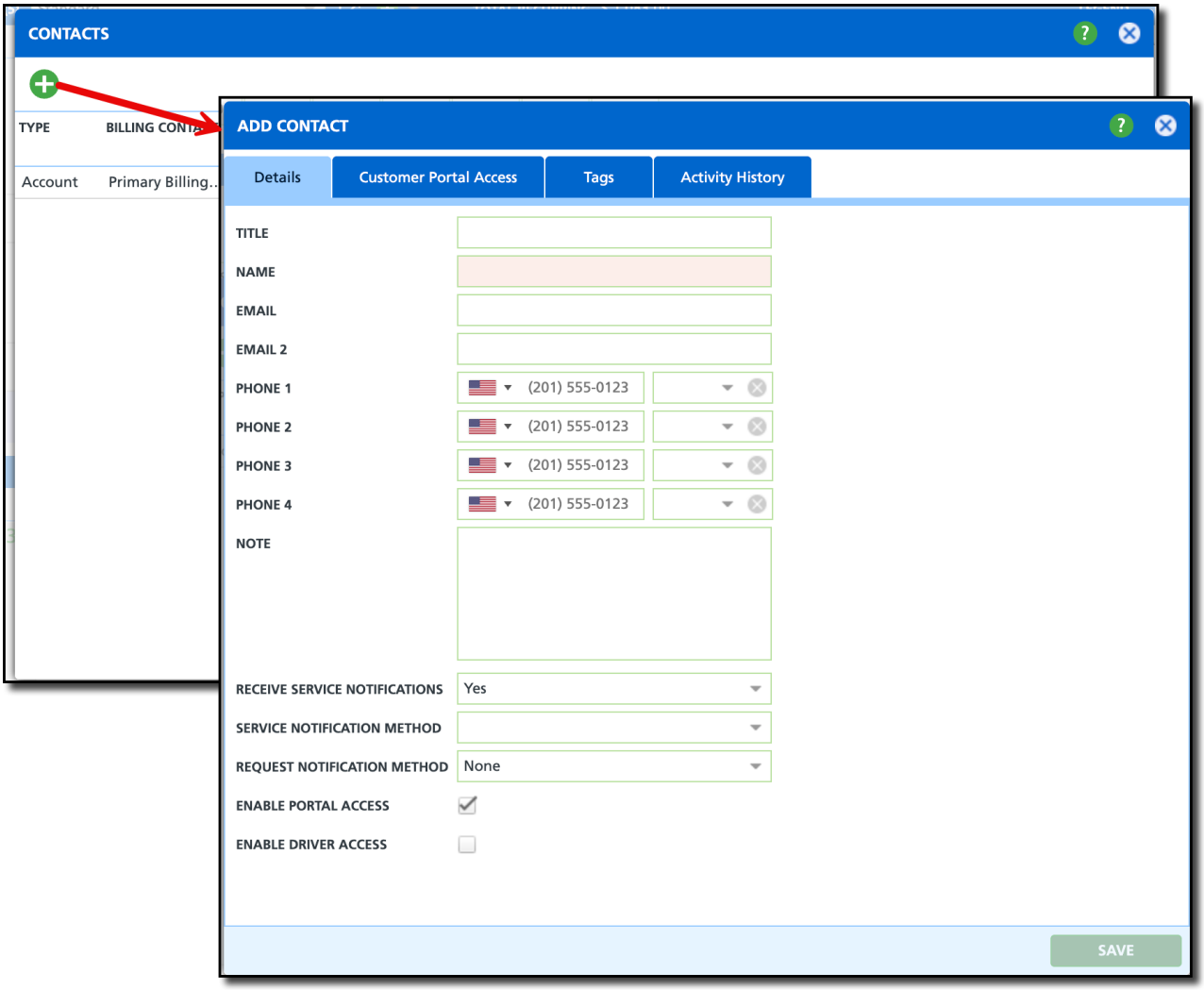
There are two ways to access Contacts from the Account screen:

1. Select the **green +** icon and select **Contact** from the list.
2. Select **View Contacts** icon just above the paperclip icon.



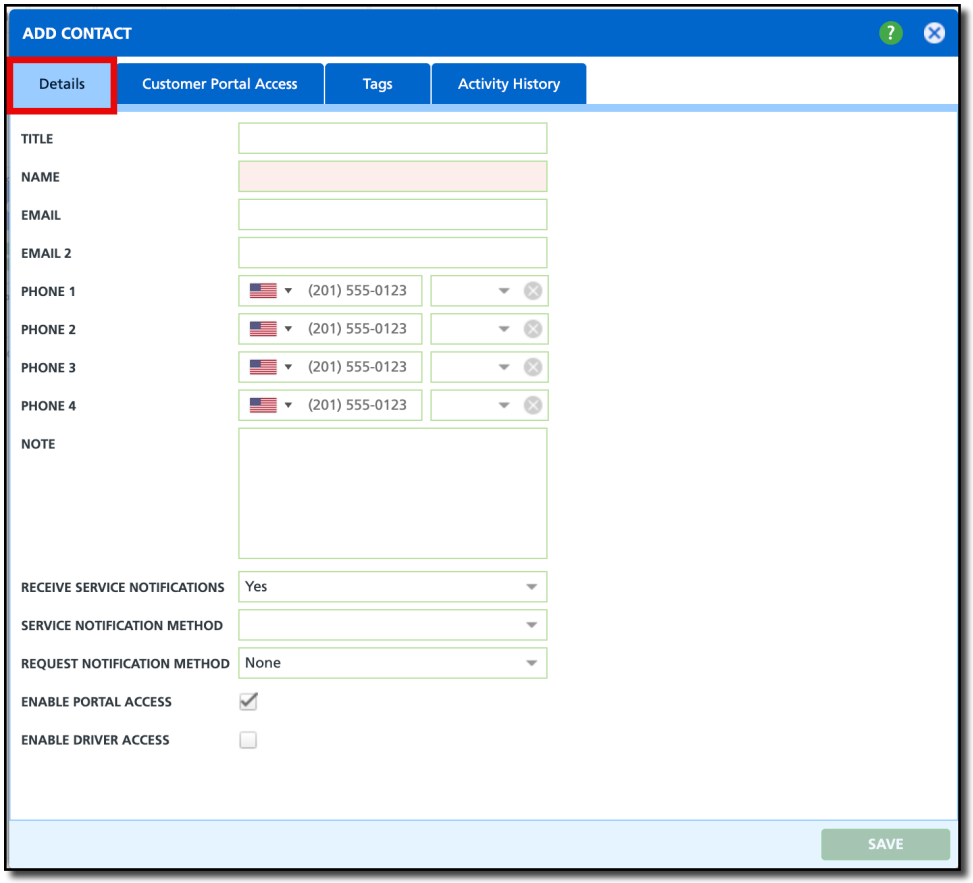
Add Contact - Tab and Field Descriptions

The Add Contact screen allows users to create a new Contact using a tabbed screen interface. This section will describe each section and the fields that need to be completed to create a contact.
Select the **green + icon** from the Contacts editor to display the **Add Contact** editornwith several tabs of data to be filled out. Mandatory fields are highlighted in red.



Tab: Details

The **Details** tab collects the necessary information for the contact including the their preferred notification method.



Add Contact - Details

1. Enter the contact's **Name** and contact information.
2. Select **Yes** if the contact should **Receive Service Notifications** for all accounts they are a contact for.
3. From the **Service Notification Method** drop down, indicate how they will receive notifications; either Email, Text Message or Email with Attachment.
4. If a **Request Notification Method** is needed, select Text Message or Email.
5. **Enable Portal Access** defaults to checked (enabled) if Customer Portal is enabled. Deselect to disable the portal for this contact. If checked, upon save a Portal Userid will be assigned.
6. **Enable Driver Access** defaults to unchecked (disabled). This is provided to support 3rd party drivers that use Waste Connector. When enabled, the contact (identified as a driver) is only able to successfully login to Waste Connector. If disabled, the driver will receive a "Login Failed" message.
7. Select **Save** when finished.

After saving the details for the contact record, additional contact fields display. If this is a billing contact, select if they are either Billing Contact 1 or 2 from the **Billing Contact** field. In addition, select 'Send Portal Access Invite' if the contact should have access to the Account Portal.

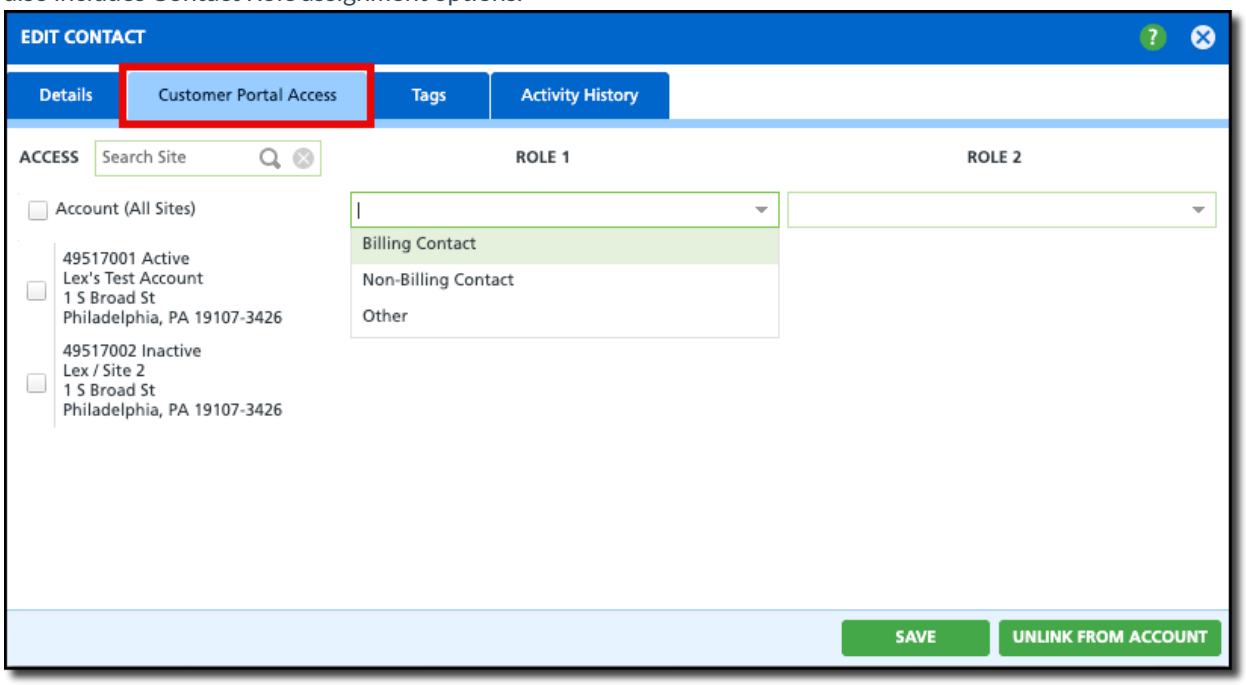
Notification Settings

Notification Setting	Description
Receive Service Notifications	An option to allow the account/site contact to receive service notifications to the method identified in the **Service Notification Method** field.

Service Notification Method	If **Receive Service Notifications** is set to 'Yes,' choose the preferred method for the contact to receive notifications.
Receive Invoice Notifications *Only displays on Edit Contact screen*	Option to **allow a non-billing contact** to receive invoice notifications. This option only appears **IF**: • The **Billing Contact** field is set to 'None' • The contact link type is set to 'Account-level'
Receive Past Due Notification *Only displays on Edit Contact screen*	Option to **allow a non-billing contact** to receive past due notifications. This option only appears **IF**: • The **Billing Contact** field is set to 'None' • The contact link type is set to 'Account-level' • The **primary billing contact** on the account must have their delivery option set to email. This setting ensures that additional non-billing contacts can also receive invoice notifications via email.

Tab: Customer Portal Access

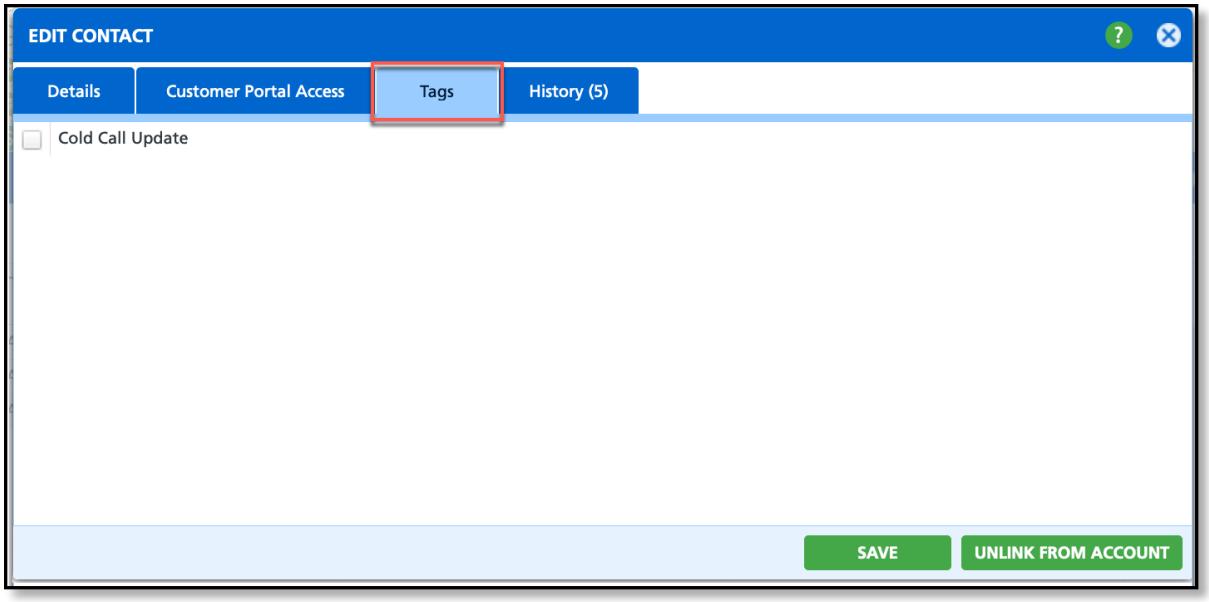
The **Customer Portal Access** tab designates which sites a contact on the account should have portal access to. It also includes Contact Role assignment options.



1. Select the **Customer Portal Access** tab.
2. Leave 'Account (All Sites)' selected and the user will have access to all sites belonging to the account. Otherwise, unselect the check box and select only the sites the user should have portal access to.
3. Optionally, assign 1 or 2 roles to the Contact. These roles can be used to query contacts using the Database Query tool. To learn more, refer to the Contact Role Setup article.
4. Select **Save** when finished.

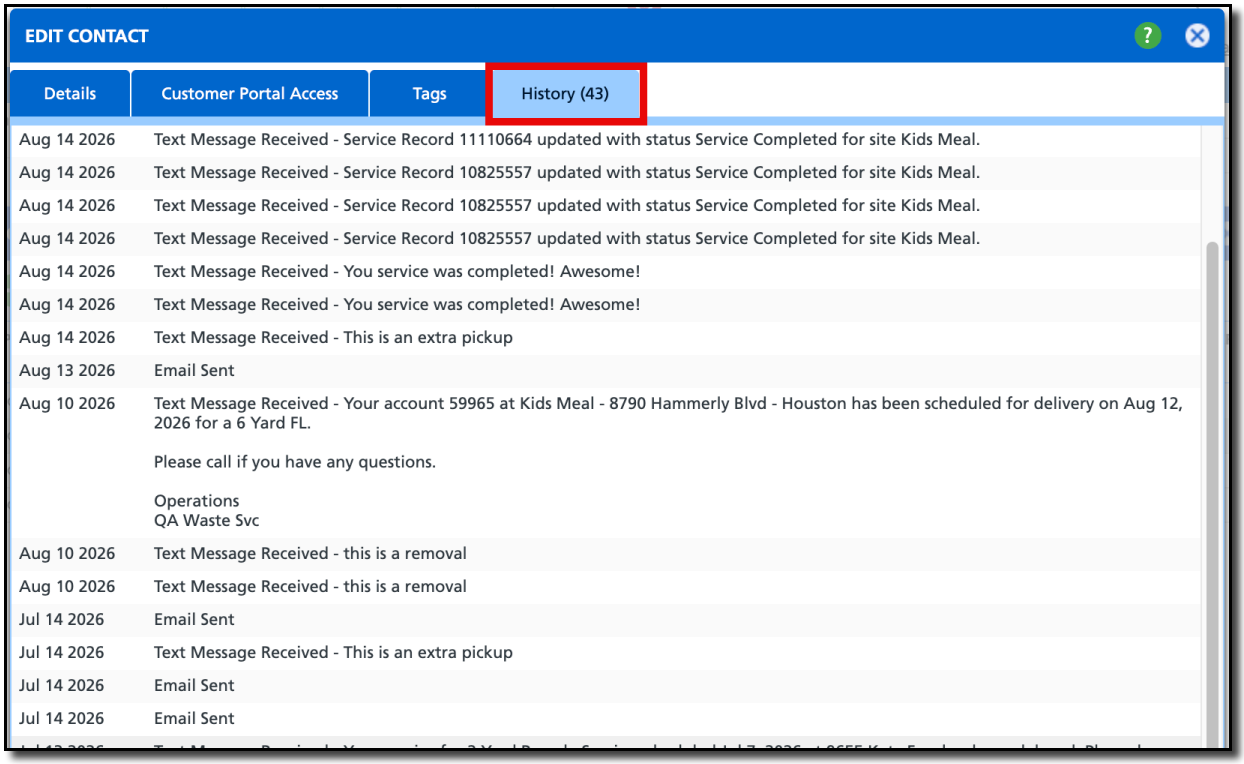
Tab: Tags

Tags are created in *Setup* > *Sales* > *Tag Type* and are only indicators, or flags for a contact.



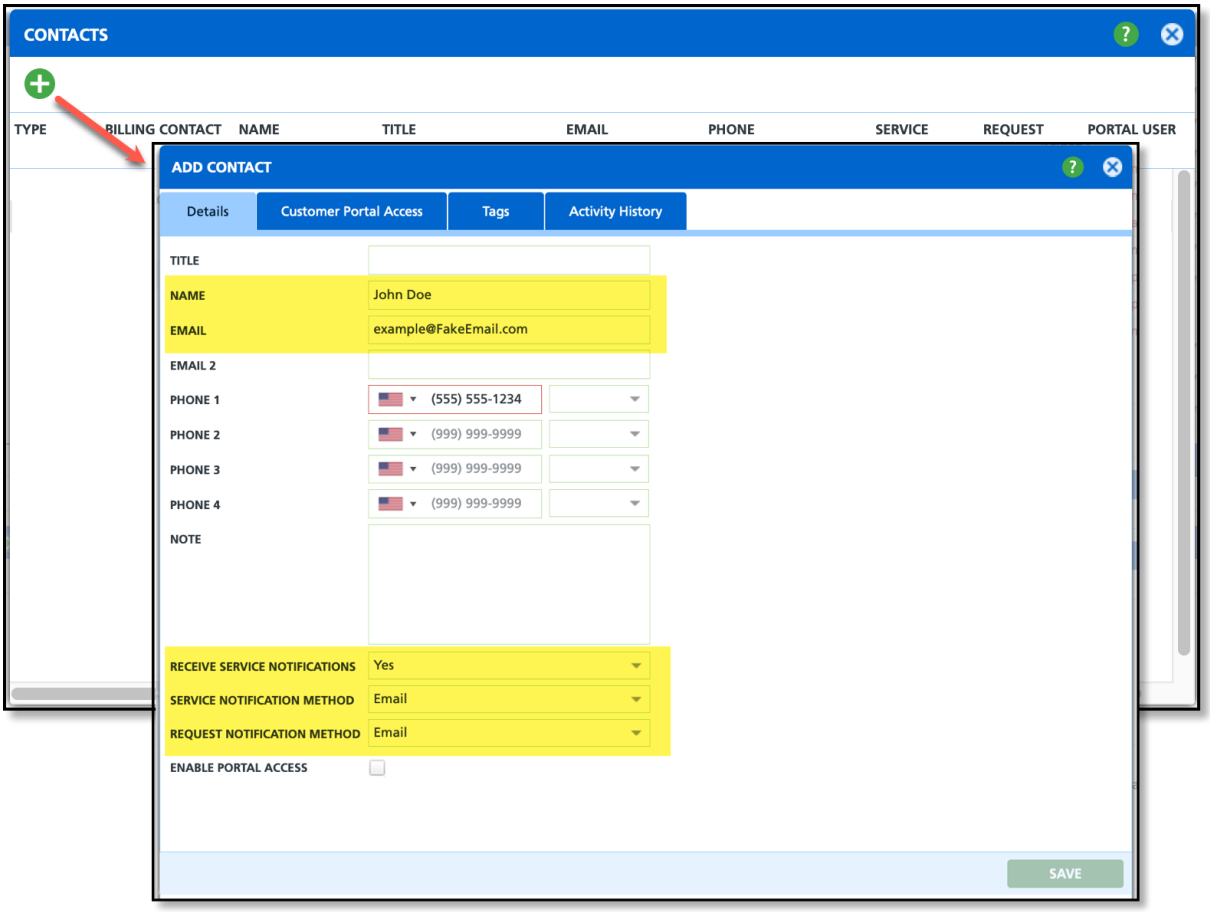
Tab: History

The **History** tab provides a history of emails sent from the *Customer Service* screen to the contact. This does not include invoice emails sent from AR History.



Add a Non-Billing Contact

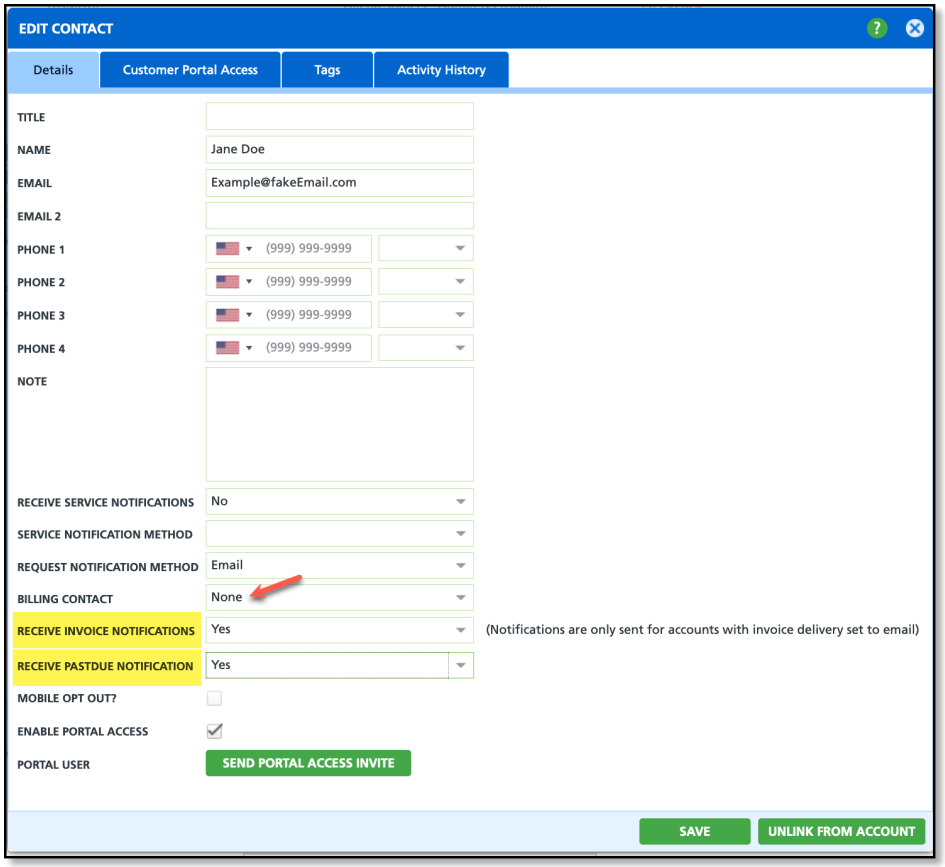
Add a non-billing contact to an account for handling non-billing inquiries.
Review the fields highlighted in yellow on this image. Required fields for a contact are name and either an email or a phone number that the contact can be reached at. Review additional fields and determine if the contact should also receive notifications and how they want to receive those notifications.



Allow a Non-Billing Contact to Receive Billing Notifications

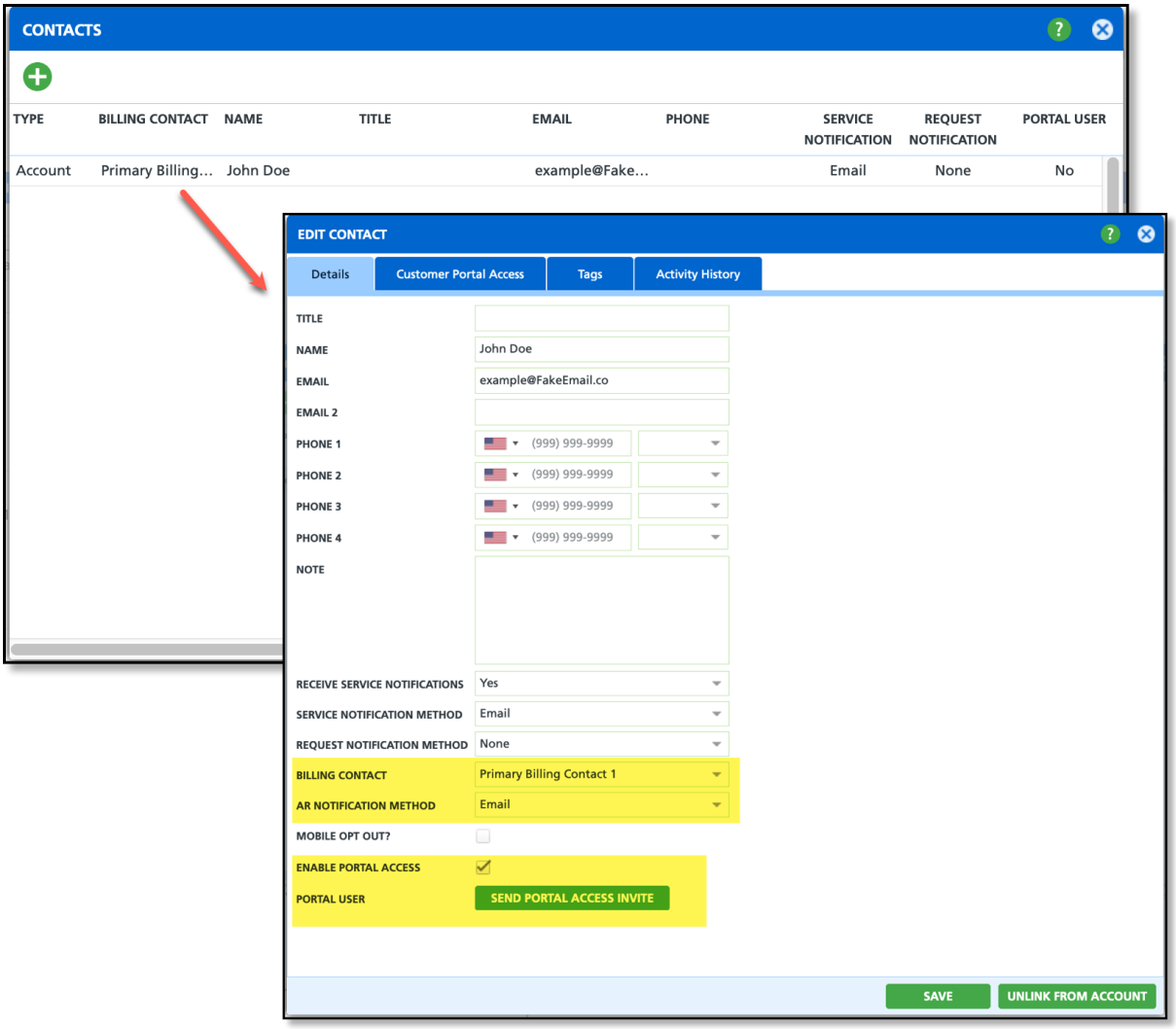
Settings are available to send invoice and past-due notifications to non-billing contacts on an account. The requirements for this include:

- The account must have a billing contact.
    - The billing contact must have their 'Request Notification Method' set to **Email.**
- The non-billing contact's setup should include:
    - Valid email address.
    - Billing Contact field set to 'No.'
    - Receive Invoice Notifications and Receive Past-due Notification fields set to 'Yes,' dependent on which notifications they should receive.



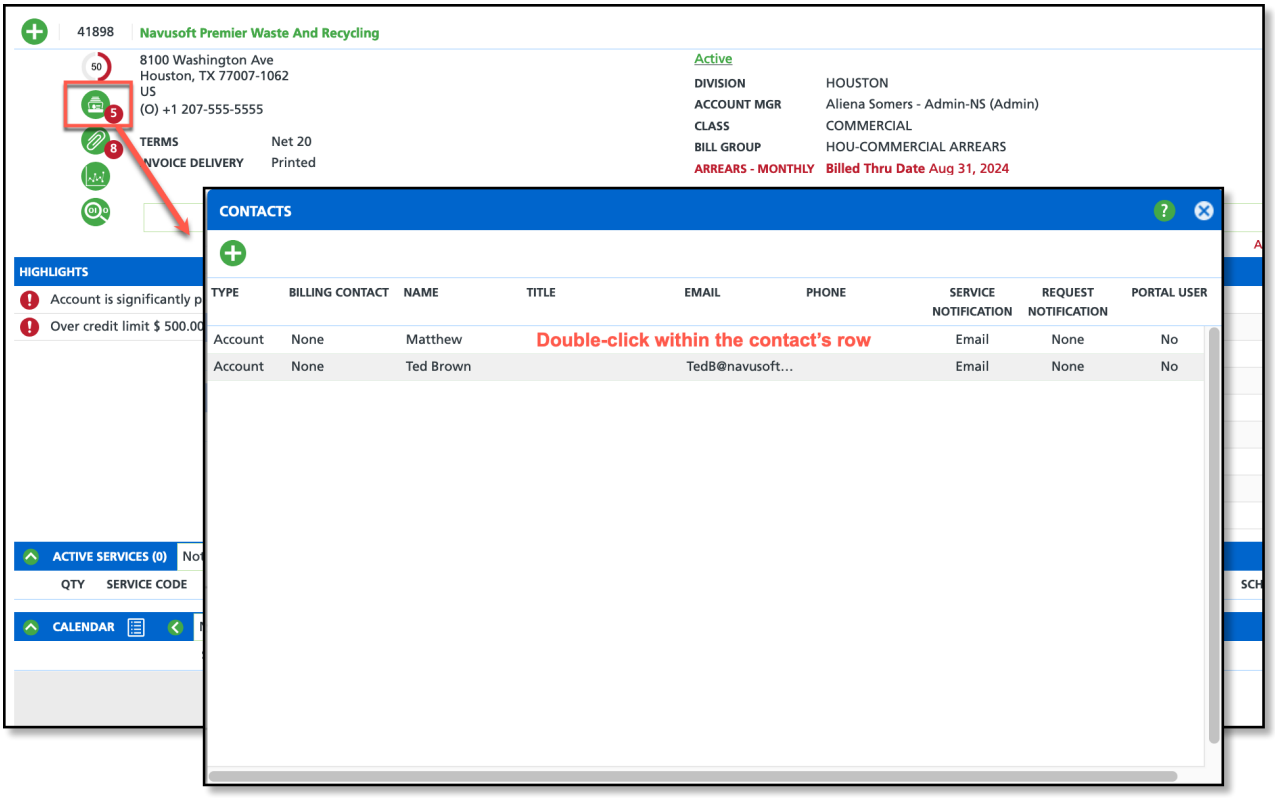
Add a Billing Contact

Add a billing contact to the account to manage billing inquiries and receive invoice notifications.
After saving a contact to an account, double-click the contact's name on the Contacts screen to open the Edit Contact popup editor. Unlike the Add Contact screen, the Edit Contact screen includes the Billing Contact identifier field and other fields specific to billing contacts. You can also decide whether to grant portal access to a billing contact, enabling them to process payments and manage auto-pay settings.



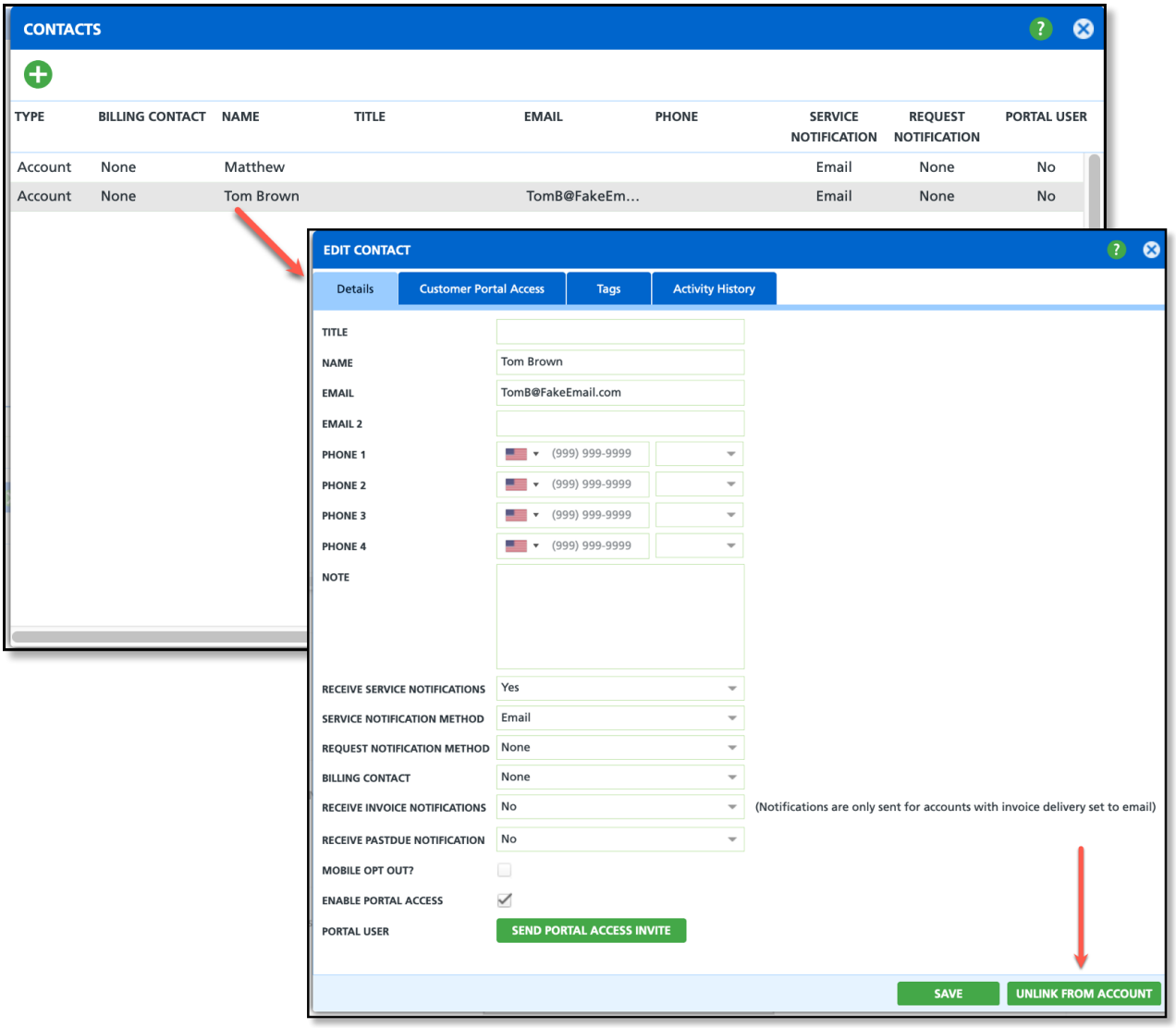
Edit an Existing Contact

In the Account section of the Customer Service screen, select the 'View Contacts' icon to open the Contacts screen. Double-click on a contact to open the Edit Contact popup editor and make your changes.



Remove a Contact

In the Account section of the Customer Service screen, select the 'View Contacts' icon to open the Contacts screen. Double-click on a contact to open the Edit Contact popup editor where you can then unlink the contact from the account.



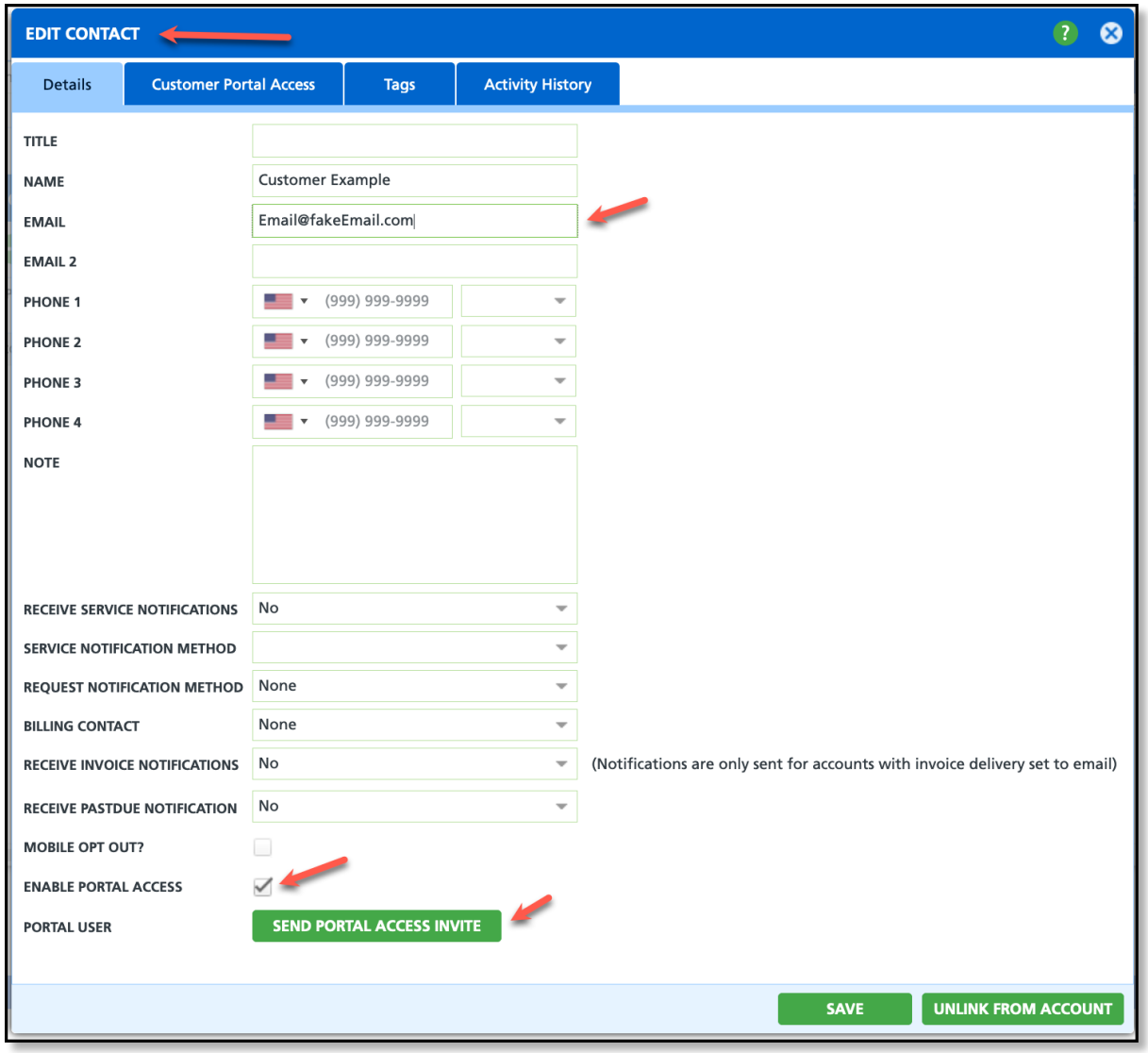
Grant Customer Portal Access to Contacts

After adding a contact to an account or site, you can grant them portal access directly from the Edit Contacts screen. Configure their access as an account-level contact or restrict it to specific sites, ensuring they only see what you want them to. Additional information regarding system setup requirements for Customer Portal can be found here: Customer Portal Setup.

Optional setup is available to automatically send portal invitations to new contacts and to allow customers to self-register for a Customer Portal account, following the process outlined in this article: Setting Up Portal Access for Contacts

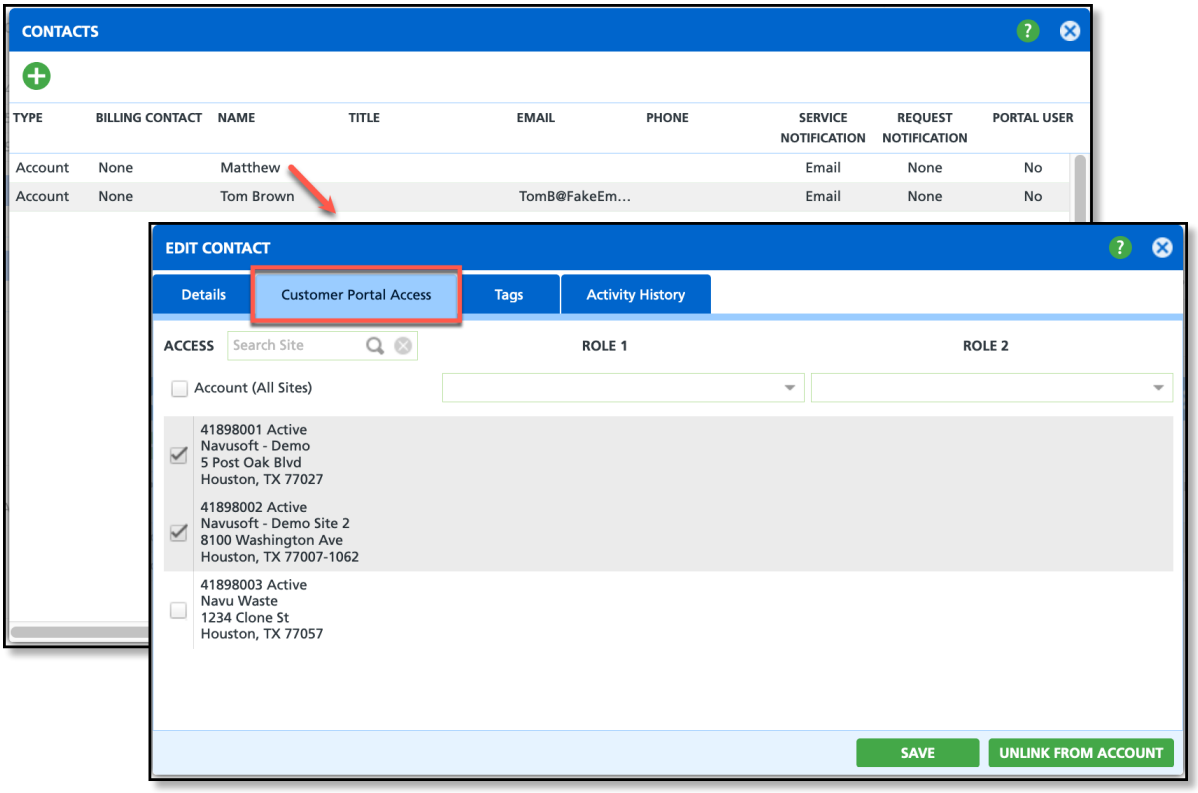
Details (Tab)

Use the **Details** tab to add a contact and enable their portal access. The fields on the Details tab will update once the contact is added, saved, and reopened. This includes the **Send Portal Access Invite** button, which requires the contact's email address to send the portal invite.



Customer Portal Access (Tab)

Use the **Customer Portal Access** tab to manage a contact's access level. Access can be granted at the account level or restricted to the site level.



Grant Access to All Sites

To grant a contact access to all sites that belong to the account, select the **Account (All Sites)** checkbox.

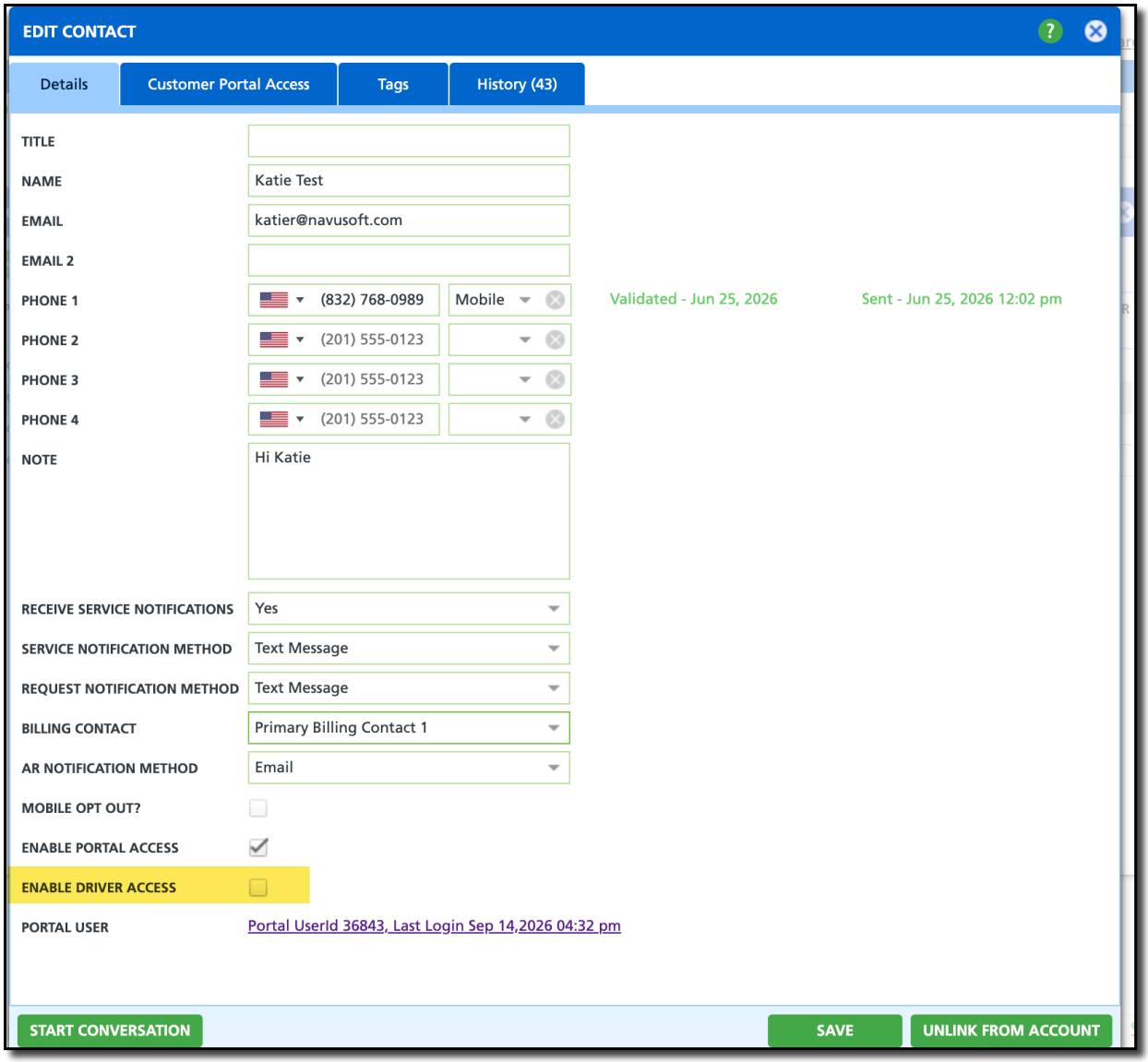
Grant Limited Site Access

To restrict a contact's portal access to specific sites, deselect the **Account (All Sites)** checkbox and check only the boxes for the sites the contact is permitted to access.

Grant 3rd Party Driver Access to Contacts

[Support for the Future Implementation of our Waste Connector product.]

After adding a contact to an account or site, you can grant them a specific type of driver access to the portal. Setting their access as a Driver, ensures they only have access to the Waste Connector portal. This is specific to 3rd party drivers using Waste Connector to communicate with an unattended scale.



Permissions

The following permissions are required to view, add and edit Contacts.

Permission ID	Permission Name
5	View Accounts
6	View Sites
138	Edit Non-Prospect Account / Site Contact Information

Related Articles

Setting Up Customer Portal Access for Contacts
Customer Portal Setup
Contact Role Setup