

# Add and Edit Account Contact

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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.

The screenshot displays the 'Navusoft Premier Waste And Recycling' account details. It includes two address blocks, account status (Active), and various metadata fields like Division (DAYTON), Account MGR, and Class (COMMERCIAL). A summary table shows financial data across different periods. At the bottom, a calendar for January 2024 shows events for several days, including 'New Years Day' and meetings with 'Isabel Navarro' and 'Matthew Van Doren'.

CURRENT	1-30	31-60	61-90	91-120	120+	TOTAL
-51.00	135.92	0.00	649.95	0.00	222.00	956.87

## 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

## Add a New Contact

From the Account section of the Customer Service screen, select the 'View Contacts' icon to open the Contacts screen. Selecting the green '+' Add icon, the Add Contact popup editor will display. This section covers each of the tabs used to create, edit, or monitor activity with a contact.

The image shows a software interface with two windows. The top window, titled 'CONTACTS', contains a table with the following columns: TYPE, BILLING CONTACT, NAME, TITLE, EMAIL, PHONE, SERVICE NOTIFICATION, and PORTAL USER. The table lists three rows, each with 'Account' and 'None' in the first two columns. A red arrow points from a green '+' icon in the top-left corner of this window to the 'ADD CONTACT' window below.

The 'ADD CONTACT' window has a blue header and a tabbed interface with four tabs: 'Details', 'Customer Portal Access', 'Tags', and 'Activity History'. The 'Details' tab is active and contains the following form fields:

- TITLE: Text input field
- NAME: Text input field
- EMAIL: Text input field
- EMAIL 2: Text input field
- PHONE 1: Country dropdown (USA), area code dropdown ((999) 999-9999), and phone number input field
- PHONE 2: Country dropdown (USA), area code dropdown ((999) 999-9999), and phone number input field
- PHONE 3: Country dropdown (USA), area code dropdown ((999) 999-9999), and phone number input field
- PHONE 4: Country dropdown (USA), area code dropdown ((999) 999-9999), and phone number input field
- NOTE: Text area
- RECEIVE SERVICE NOTIFICATIONS: Dropdown menu with 'Yes' selected
- SERVICE NOTIFICATION METHOD: Dropdown menu
- REQUEST NOTIFICATION METHOD: Dropdown menu

A 'SAVE' button is located at the bottom right of the 'ADD CONTACT' window.

**Tab: Details**

The Details tab of the Add/Edit Contact screen collects the necessary contact information for the contact including their preferred notification method.

**ADD CONTACT**
?
✕

Details
Customer Portal Access
Tags
Activity History

TITLE

NAME

EMAIL

EMAIL 2

PHONE 1 🇺🇸 (999) 999-9999

PHONE 2 🇺🇸 (999) 999-9999

PHONE 3 🇺🇸 (999) 999-9999

PHONE 4 🇺🇸 (999) 999-9999

NOTE

RECEIVE SERVICE NOTIFICATIONS Yes

SERVICE NOTIFICATION METHOD

REQUEST NOTIFICATION METHOD None

## Add Contact

1. Select the **green + icon** in the account section of the Customer Service screen and select **Contacts** from the list. The Contacts popup editor will display.
2. Select the **green + icon** from the Contacts editor to display the **Add Contact** editor.
3. Select the **Details** tab.
4. Enter the contact's **Name** and contact information.
5. Select **Yes** if the contact should receive service notifications for all accounts they are a contact for.
  - From the **Service Notification Method** drop down, indicate how they will receive notifications.
6. Select **Save** when finished.



After saving 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
<b>Receive Service Notifications</b>	Optional setting that allow the account/site contact to receive service notifications to the method identified in the 'Service Notification Method' field.
<b>Service Notification Method</b>	If 'Receive Service Notifications' is set to 'Yes,' choose the preferred method for the contact to receive notifications..

<p><b>Receive Invoice Notifications</b> Only displays on Edit Contact screen</p>	<p>Option to <b>allow a non-billing contact</b> to receive invoice notifications. To set this up for a non-billing contact, the following is required:</p> <ul style="list-style-type: none"> <li>This field only displays IF 'None' is selected for the Billing Contact field and the contact link type is Account-level.</li> </ul>
<p><b>Receive Past Due Notification</b> Only displays on Edit Contact screen</p>	<p>Option to <b>allow a non-billing contact</b> to receive past due notifications. To set this up for a non-billing contact, the following is required:</p> <ul style="list-style-type: none"> <li>This field only displays IF 'None' is selected for the Billing Contact field and the contact link type is Account-level.</li> <li>The <b>primary billing contact</b> 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.</li> </ul>

### Tab: Customer Portal Access

The Customer Portal Access tab designates which sites a contact on the account should have portal access to.

The screenshot shows the 'EDIT CONTACT' window with the 'Customer Portal Access' tab selected. The interface features a search bar labeled 'ACCESS Search Site' with a magnifying glass icon. Below the search bar, there are two columns: 'ACCESS' and 'ROLE 1' / 'ROLE 2'. The 'ACCESS' column contains a list of sites with checkboxes:

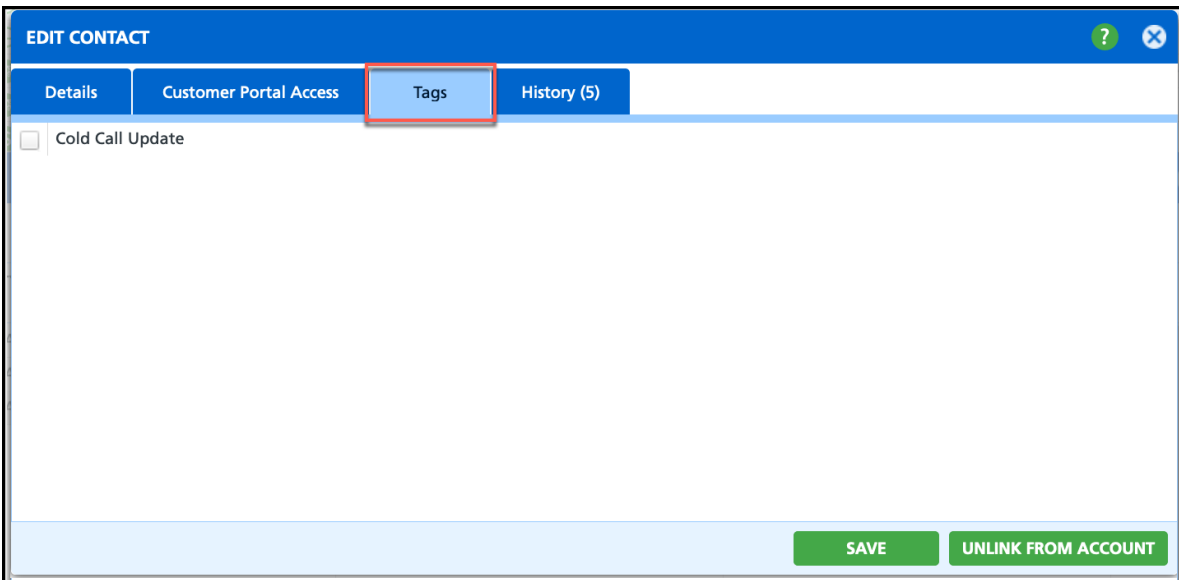
- Account (All Sites)
- 41902001 Active Example Site 1  
2222 Navu Cir  
Corpus Christi, TX 78411
- 41902002 Active Hotel  
7077 Willoughby Ave  
Los Angeles, CA 90038-2377

The 'ROLE 1' and 'ROLE 2' columns each have a dropdown menu. At the bottom right, there are two green buttons: 'SAVE' and 'UNLINK FROM ACCOUNT'.

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. Select **Save** when finished.

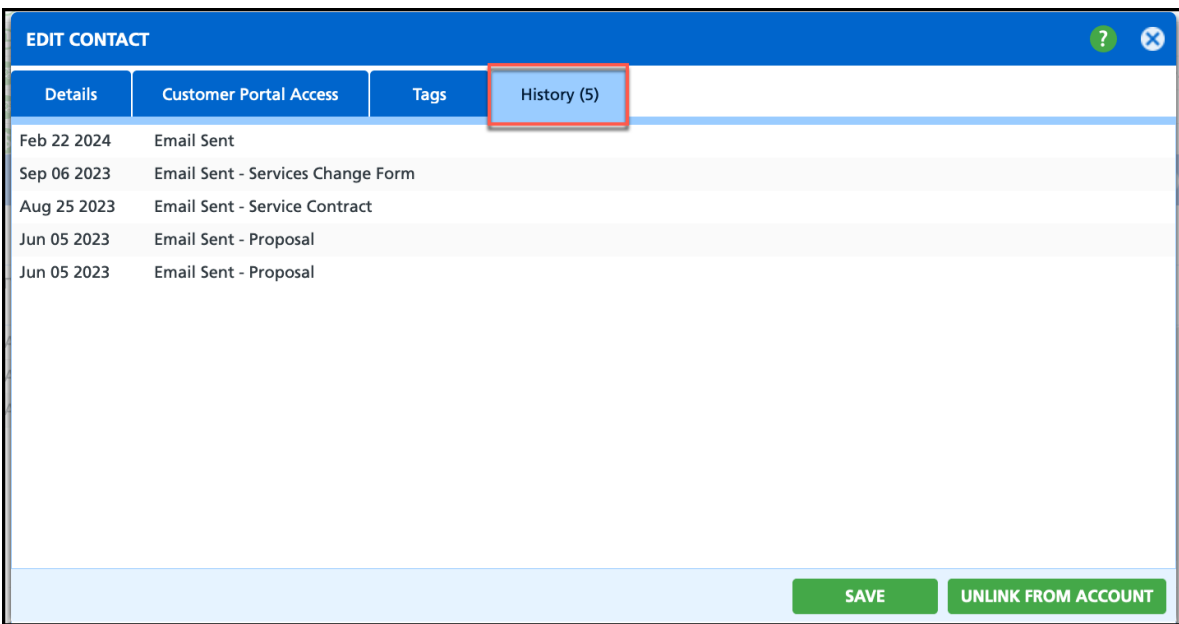
### Tab: Tags

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.



## Edit an Existing Contact

The process to edit an existing contact is similar to the process of creating a new contact.

41898 Navusoft Premier Waste And Recycling

8100 Washington Ave  
Houston, TX 77007-1062

Active

TERMS Net 20

INVOICE DELIVERY PRINTED

DIVISION DAYTON

ACCOUNT MGR House Acct non System

CLASS COMMERCIAL

BILL GROUP DAY-BAD DEBT \ INACTIVE

Bill Thru Date Dec 19, 2023

91-120

649.95

HIGHLIGHTS

Account is signi

ACTIVE SERVICES

QTY	SERVICE
1	30 Yard
1	2 Yard Trash Service
1	30 Yard Open Top Service
15	15 Yard Open Top Service

**CONTACTS**

TYPE	BILLING CONTACT	NAME	TITLE	EMAIL	PHONE	SERVICE NOTIFICATION	PORTAL USER
Account	Billing Contact 1	Matthew				Email	No
Account	Billing Contact 2	Aliena		aliena@Fak...		Email	Yes
Account	None	Matt				No	No
Account	None	Isabel		isabeln@Fak...		Email	Yes

PENDING

1292
1511
1529
59334
59337

1. Select the **View Contacts** icon from the Account section of the Customer Service screen.
2. Double click within the row of the contact you would like to update and the Edit Contact popup editor will display.
3. Update the necessary fields.
4. Select **Save** when finished.