

Add and Edit Account Contact

Last Modified on 11/20/2024 12:40 pm PST

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 account details for 'Navusoft Premier Waste And Recycling' (Account ID: 41898) and 'Navusoft - Demo' (Account ID: 41898001). The account is active and located at 8100 Washington Ave, Houston, TX 77007-1062. Key details include:

- Account Information:** Division: DAYTON, Account MGR: House Acct non System, Class: COMMERCIAL, Bill Group: DAY-BAD DEBT \ INACTIVI.
- Financials:** Arrears - Monthly, Billed Thru Date Dec 19, 20, Next Invoice Date.
- Invoice Details:** Invoice by Email: No, Terms: Net 20, Source: Cold Call, Rebate Payment Type: Not Applicable.
- Site Information:** Post Oak Blvd, Houston, TX 77057, Harris County, US, Phone: +1 626-777-7777, Access Gate Code 1234, Note: Site Notes.
- Other Details:** Division: CORPUS, Service Region: CORPUS OPEN MARKET, Sales Rep: House Acct non System, Source: Cold Call, Generator: Not Applicable, Tax Region: CC CITY-NUECES COU-CC MT, Tax Exempt: No, LEED Reportable: No.

 A summary table at the bottom shows the following values:

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

 Below the summary table is a calendar view for January 2024, showing events for various dates, including New Years Day on Jan 1 and several events on Jan 3, 4, and 5. A 'View Contacts' icon is highlighted in the top left corner of the account details section.

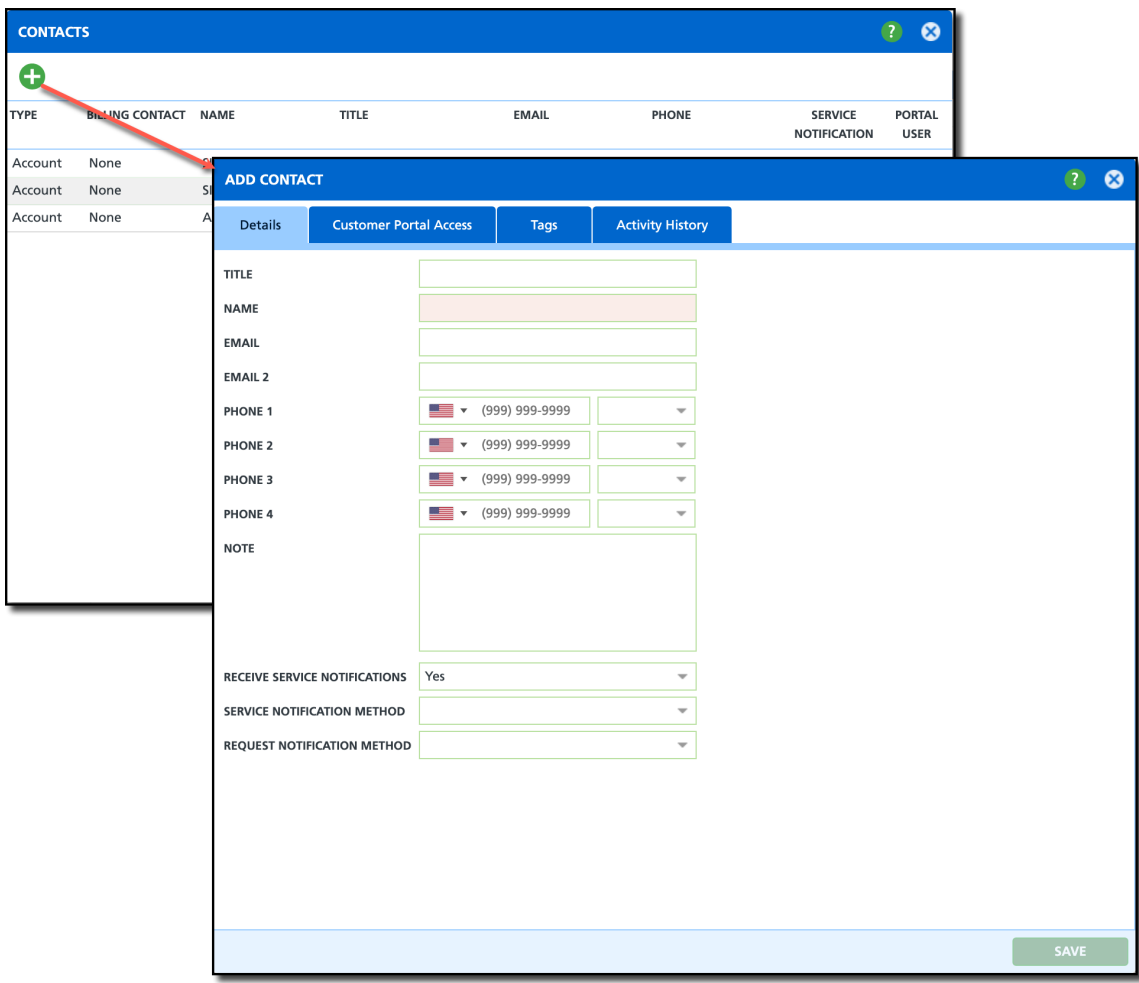
Permissions

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 Contact Tab and Field Descriptions

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.



Tab: Details

The Details tab of the Add/Edit Contact screen collects the necessary contact information for the contact including the 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

SAVE

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.
 1. Select **Yes** if the contact should receive service notifications for all accounts they are a contact for.
 2. From the **Service Notification Method** drop down, indicate how they will receive notifications.
5. 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
Receive Service Notifications	Optional setting that 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..

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

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: 'ROLE 1' and 'ROLE 2', each with a dropdown menu. On the left, there is a list of sites with checkboxes:

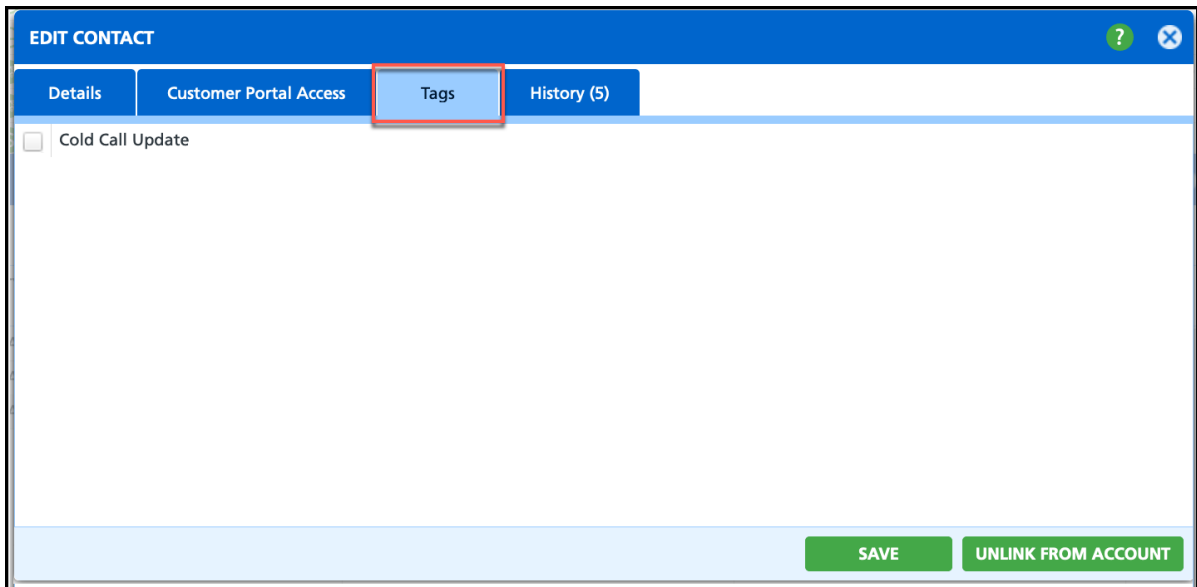
- Account (All Sites)
- 41902001 Active Example Site 1, 2222 Navu Cir, Corpus Christi, TX 78411
- 41902002 Active Hotel, 7077 Willoughby Ave, Los Angeles, CA 90038-2377

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.

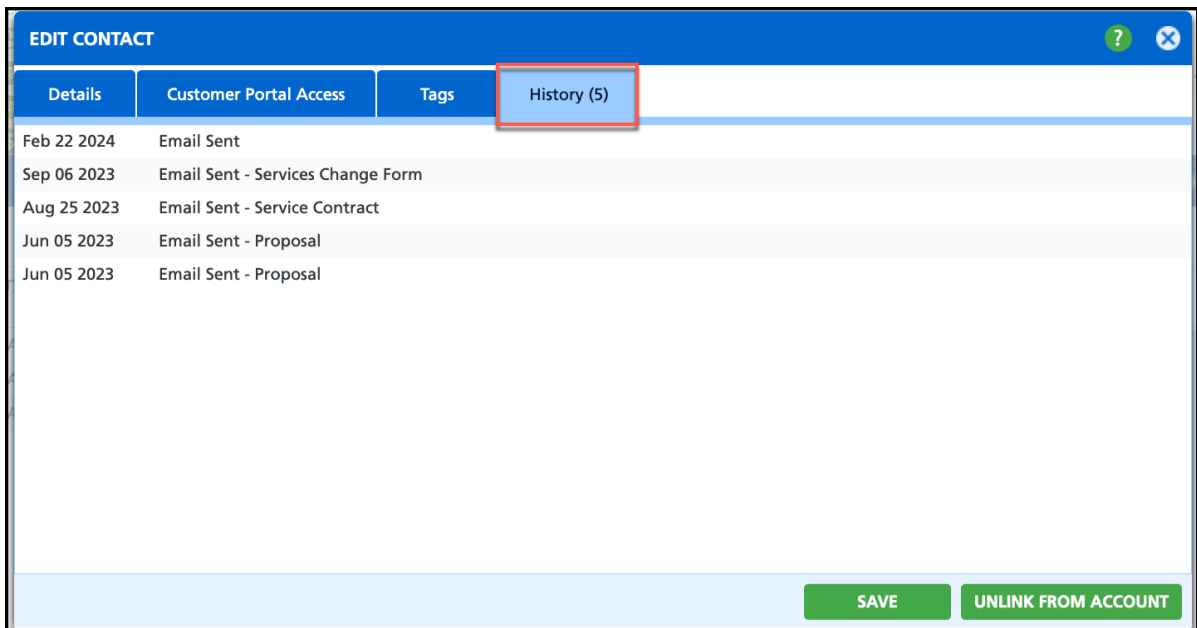
Tab: Tags

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.



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.

CONTACTS

+

TYPE BILLING CONTACT NAME TITLE EMAIL PHONE SERVICE REQUEST PORTAL USER

ADD CONTACT

Details Customer Portal Access Tags Activity History

TITLE

NAME John Doe

EMAIL example@FakeEmail.com

EMAIL 2

PHONE 1 (555) 555-1234

PHONE 2 (999) 999-9999

PHONE 3 (999) 999-9999

PHONE 4 (999) 999-9999

NOTE

RECEIVE SERVICE NOTIFICATIONS Yes

SERVICE NOTIFICATION METHOD Email

REQUEST NOTIFICATION METHOD Email

ENABLE PORTAL ACCESS

SAVE

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.

EDIT CONTACT
?
✕

Details
Customer Portal Access
Tags
Activity History

TITLE

NAME

EMAIL

EMAIL 2

PHONE 1

PHONE 2

PHONE 3

PHONE 4

NOTE

RECEIVE SERVICE NOTIFICATIONS

SERVICE NOTIFICATION METHOD

REQUEST NOTIFICATION METHOD

BILLING CONTACT

RECEIVE INVOICE NOTIFICATIONS (Notifications are only sent for accounts with invoice delivery set to email)

RECEIVE PASTDUE NOTIFICATION

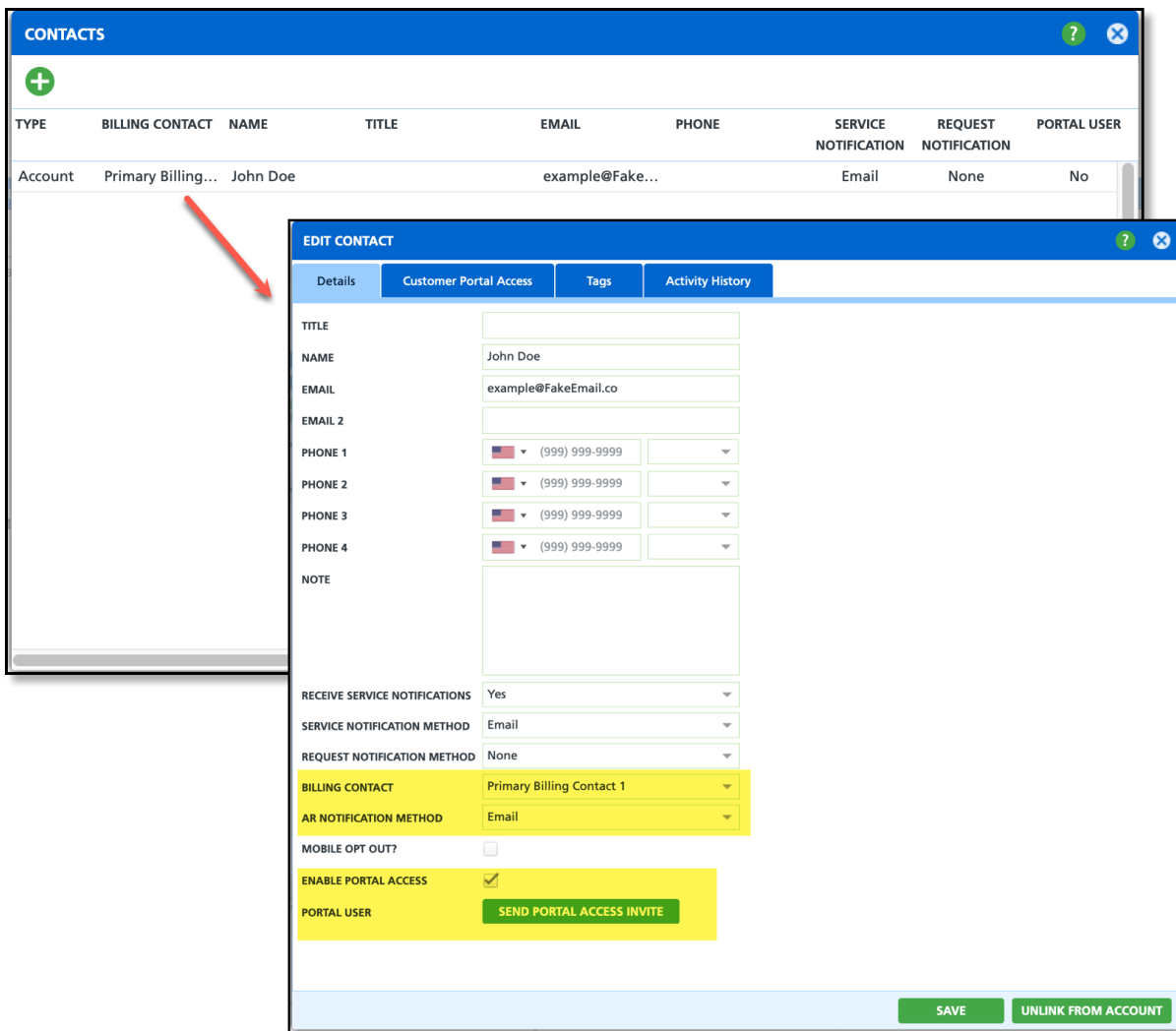
MOBILE OPT OUT?

ENABLE PORTAL ACCESS

PORTAL USER

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.

41898 Navusoft Premier Waste And Recycling

8100 Washington Ave
Houston, TX 77007-1062
US
(O) +1 207-555-5555

TERMS Net 20
INVOICE DELIVERY Printed

Active
DIVISION HOUSTON
ACCOUNT MGR Aliena Somers - Admin-NS (Admin)
CLASS COMMERCIAL
BILL GROUP HOU-COMMERCIAL ARREARS
ARREARS - MONTHLY Billed Thru Date Aug 31, 2024

CONTACTS

TYPE	BILLING CONTACT	NAME	TITLE	EMAIL	PHONE	SERVICE NOTIFICATION	REQUEST NOTIFICATION	PORTAL USER
Account	None	Matthew				Email	None	No
Account	None	Ted Brown		TedB@navusoft...		Email	None	No

ACTIVE SERVICES (0) No

CALENDAR

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.

CONTACTS

TYPE	BILLING CONTACT	NAME	TITLE	EMAIL	PHONE	SERVICE NOTIFICATION	REQUEST NOTIFICATION	PORTAL USER
Account	None	Matthew				Email	None	No
Account	None	Tom Brown		TomB@FakeEm...		Email	None	No

EDIT CONTACT

Details | Customer Portal Access | Tags | Activity History

TITLE: []

NAME: Tom Brown

EMAIL: TomB@FakeEmail.com

EMAIL 2: []

PHONE 1: [US] (999) 999-9999 []

PHONE 2: [US] (999) 999-9999 []

PHONE 3: [US] (999) 999-9999 []

PHONE 4: [US] (999) 999-9999 []

NOTE: []

RECEIVE SERVICE NOTIFICATIONS: Yes

SERVICE NOTIFICATION METHOD: Email

REQUEST NOTIFICATION METHOD: None

BILLING CONTACT: None

RECEIVE INVOICE NOTIFICATIONS: No (Notifications are only sent for accounts with invoice delivery set to email)

RECEIVE PASTDUE NOTIFICATION: No

MOBILE OPT OUT?:

ENABLE PORTAL ACCESS:

PORTAL USER:

Add a Contact as a Portal User

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](#).

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.

EDIT CONTACT ? ✕

Details **Customer Portal Access** Tags Activity History

TITLE

NAME

EMAIL

EMAIL 2

PHONE 1

PHONE 2

PHONE 3

PHONE 4

NOTE

RECEIVE SERVICE NOTIFICATIONS

SERVICE NOTIFICATION METHOD

REQUEST NOTIFICATION METHOD

BILLING CONTACT

RECEIVE INVOICE NOTIFICATIONS (Notifications are only sent for accounts with invoice delivery set to email)

RECEIVE PASTDUE NOTIFICATION

MOBILE OPT OUT?

ENABLE PORTAL ACCESS

PORTAL USER

Customer Portal Access (Tab)

Use the **Customer Portal Access** tab to manage a contact's access level.

CONTACTS

TYPE	BILLING CONTACT	NAME	TITLE	EMAIL	PHONE	SERVICE NOTIFICATION	REQUEST NOTIFICATION	PORTAL USER
Account	None	Matthew				Email	None	No
Account	None	Tom Brown		TomB@FakeEm...		Email	None	No

EDIT CONTACT

Details **Customer Portal Access** Tags Activity History

ACCESS Search Site [Q] [X]

ROLE 1 [] ROLE 2 []

- Account (All Sites)
- 41898001 Active Navusoft - Demo 5 Post Oak Blvd Houston, TX 77027
- 41898002 Active Navusoft - Demo Site 2 8100 Washington Ave Houston, TX 77007-1062
- 41898003 Active Navu Waste 1234 Clone St Houston, TX 77057

SAVE UNLINK FROM ACCOUNT

Grant Access to All Sites

To grant an account contact access to all sites within the portal, 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.