Add and Edit Contacts

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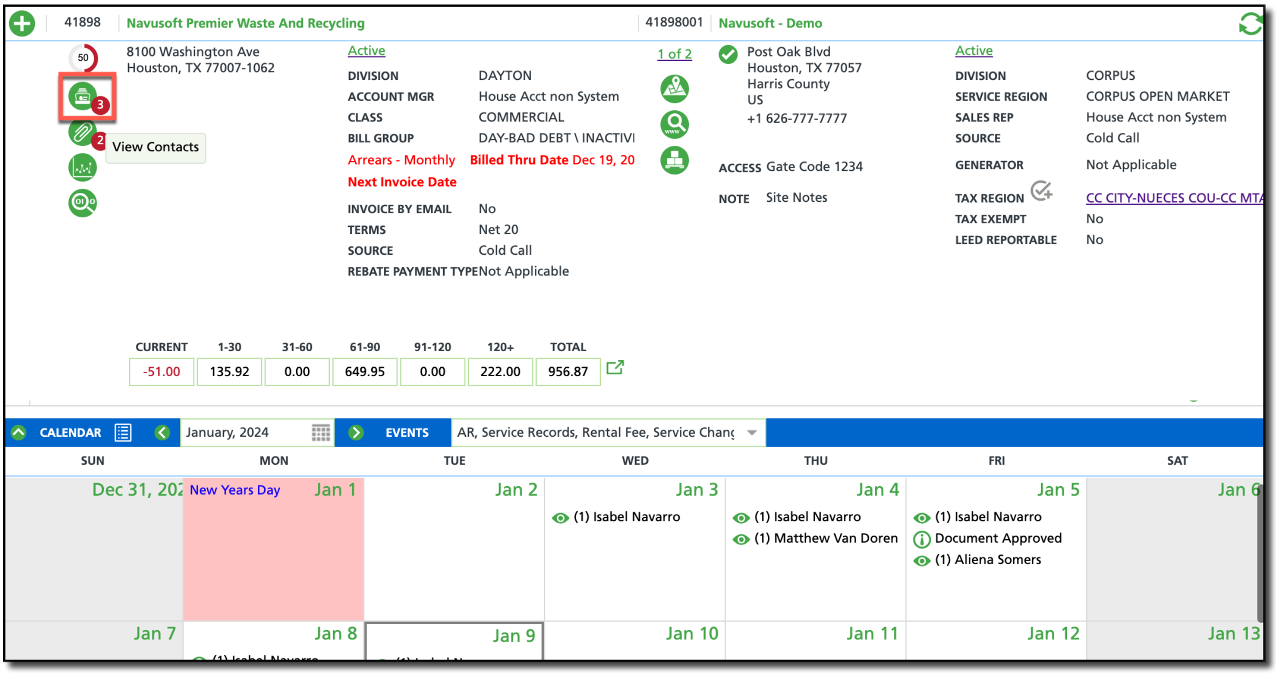
Pathway: *Accounts > Search > Accounts*

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. Adding an account contact is essential to ensure efficient communication and accurate record-keeping.



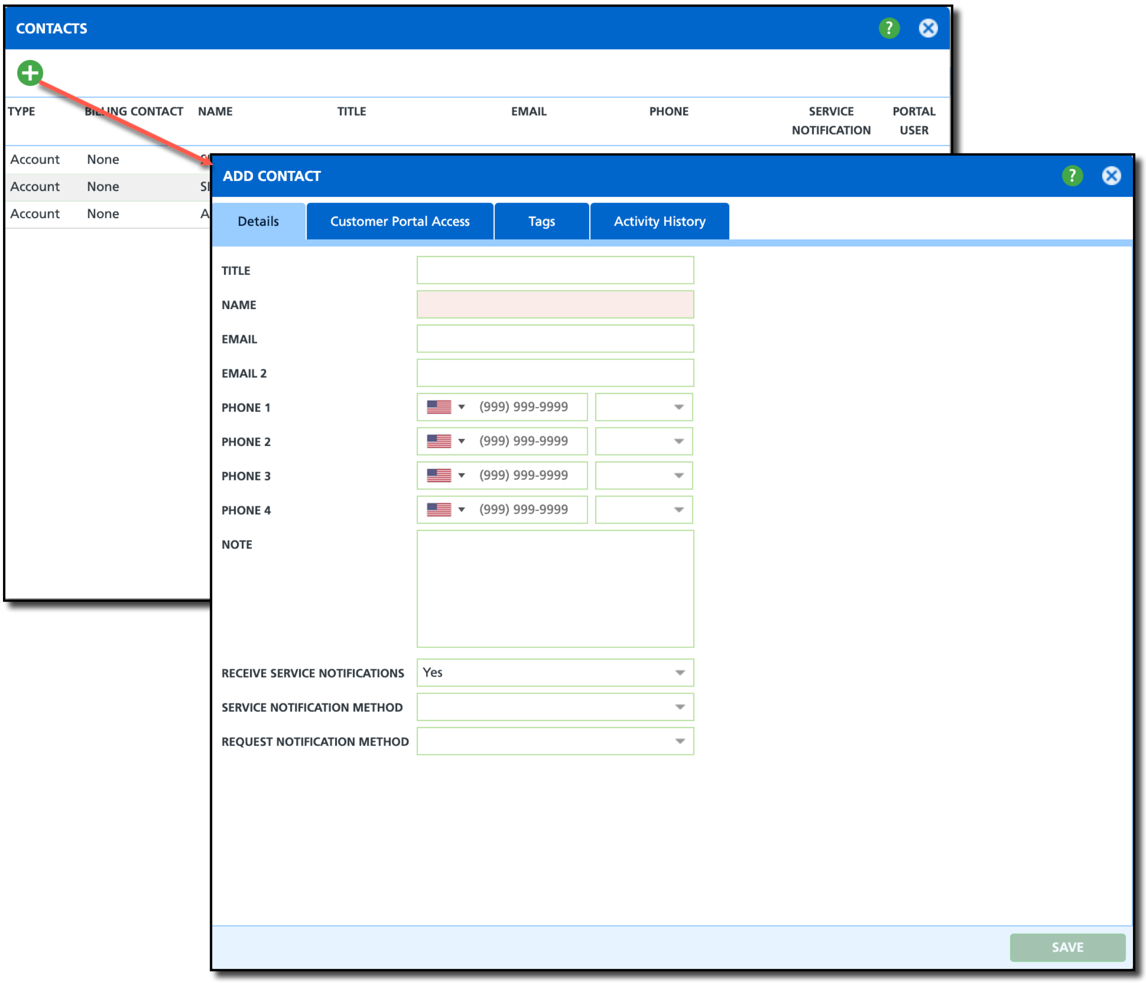
Permissions

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

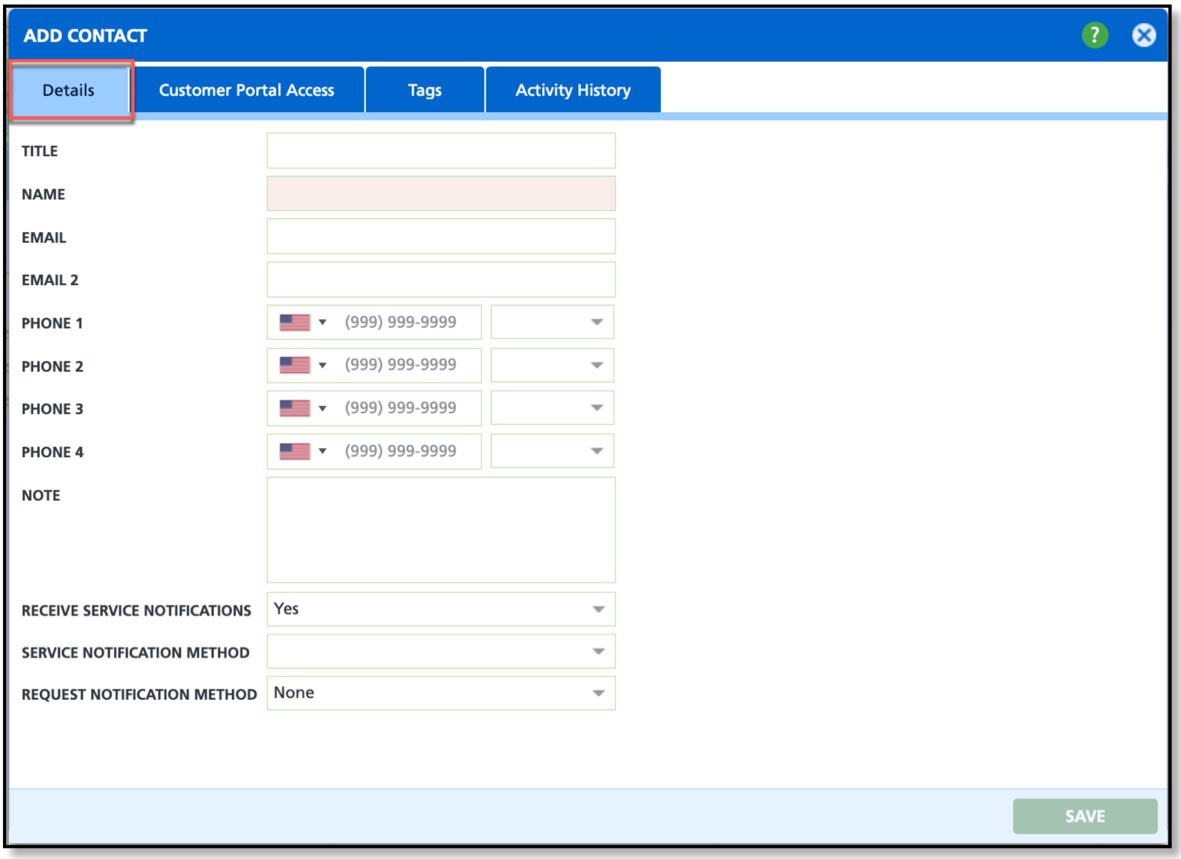
Add Contact Tab and Field Descriptions

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

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.

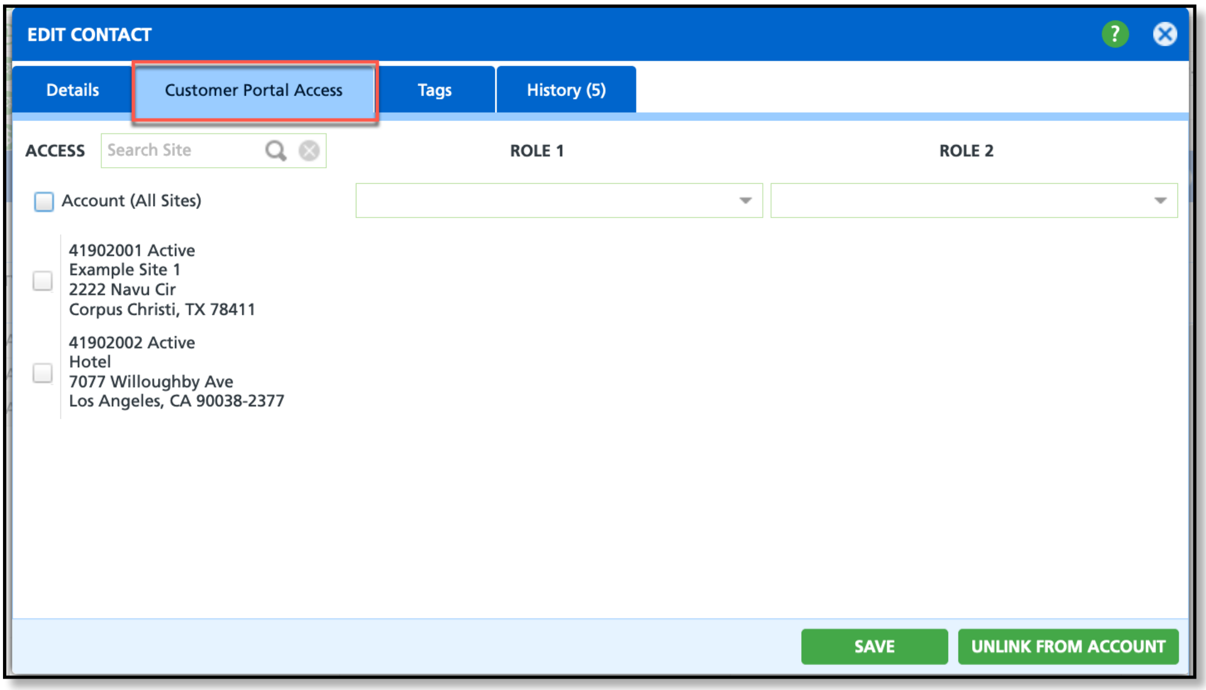
Notification Settings

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..

Receive Invoice Notifications *Only displays on Edit Contact screen*	Option to **allow anon-billing contact** to receive invoice notifications. To set this up for a non-billing contact, the following is required: • This field only displays **IF** 'None' is selected for the Billing Contact field and the contact link type is Account-level.
Receive Past Due Notification *Only displays on Edit Contact screen*	Option to **allow anon-billing contact** to receive past due notifications. To set this up for a non-billing contact, the following is required: • 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

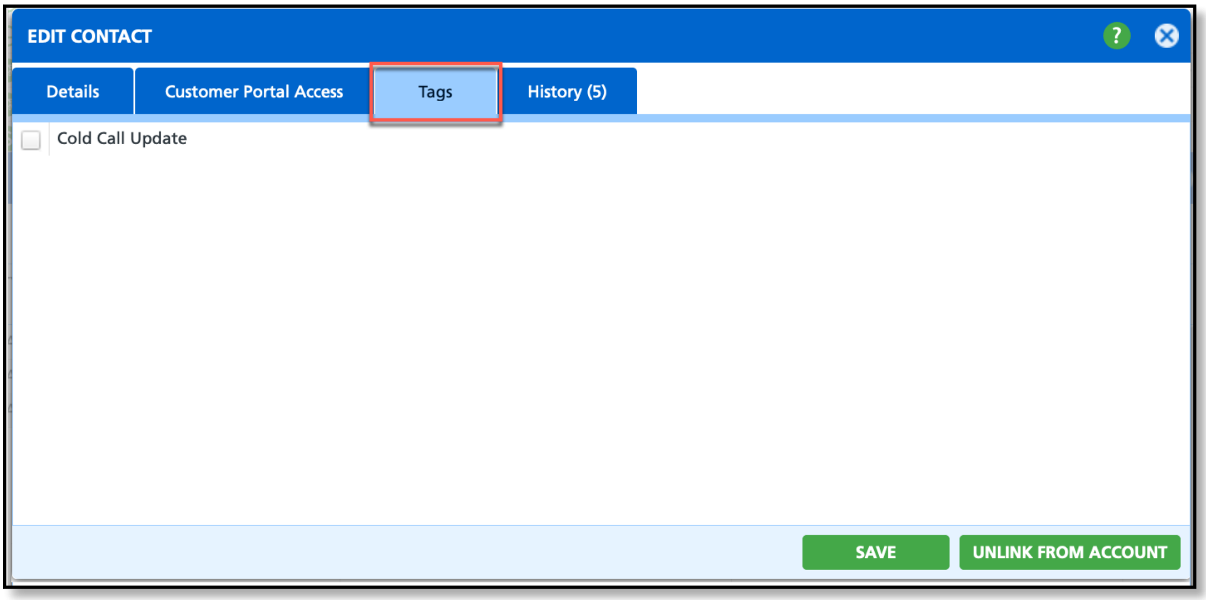
The Customer Portal Access tab designates which sites a contact on the account should have portal access to.



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.

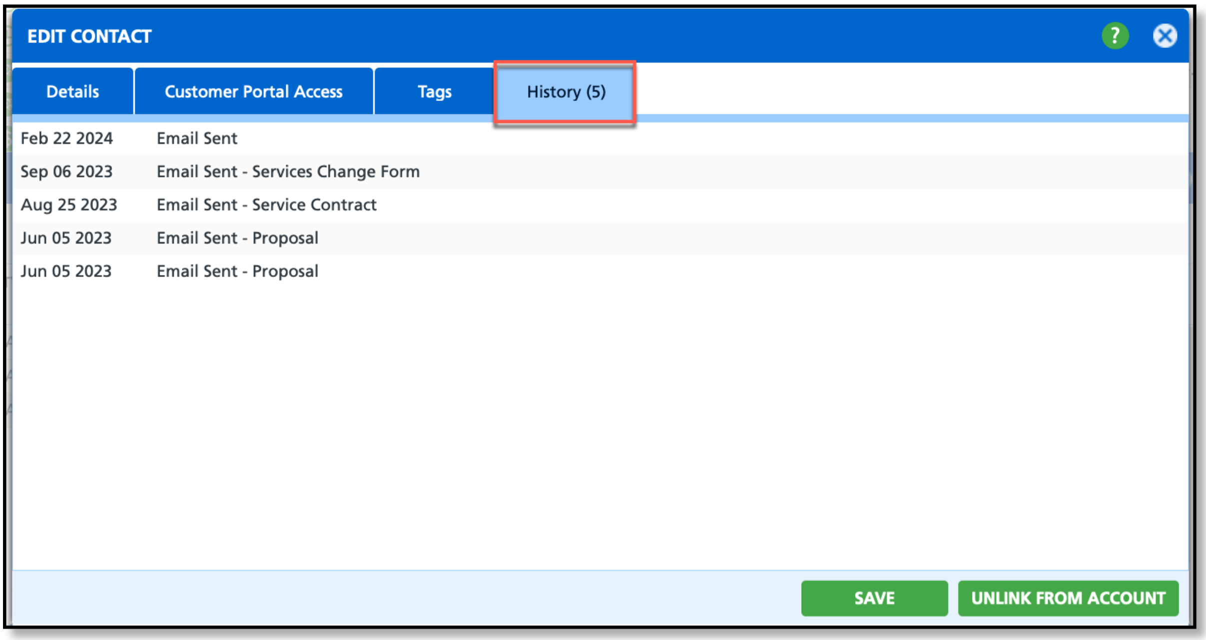
Tab: Tags

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



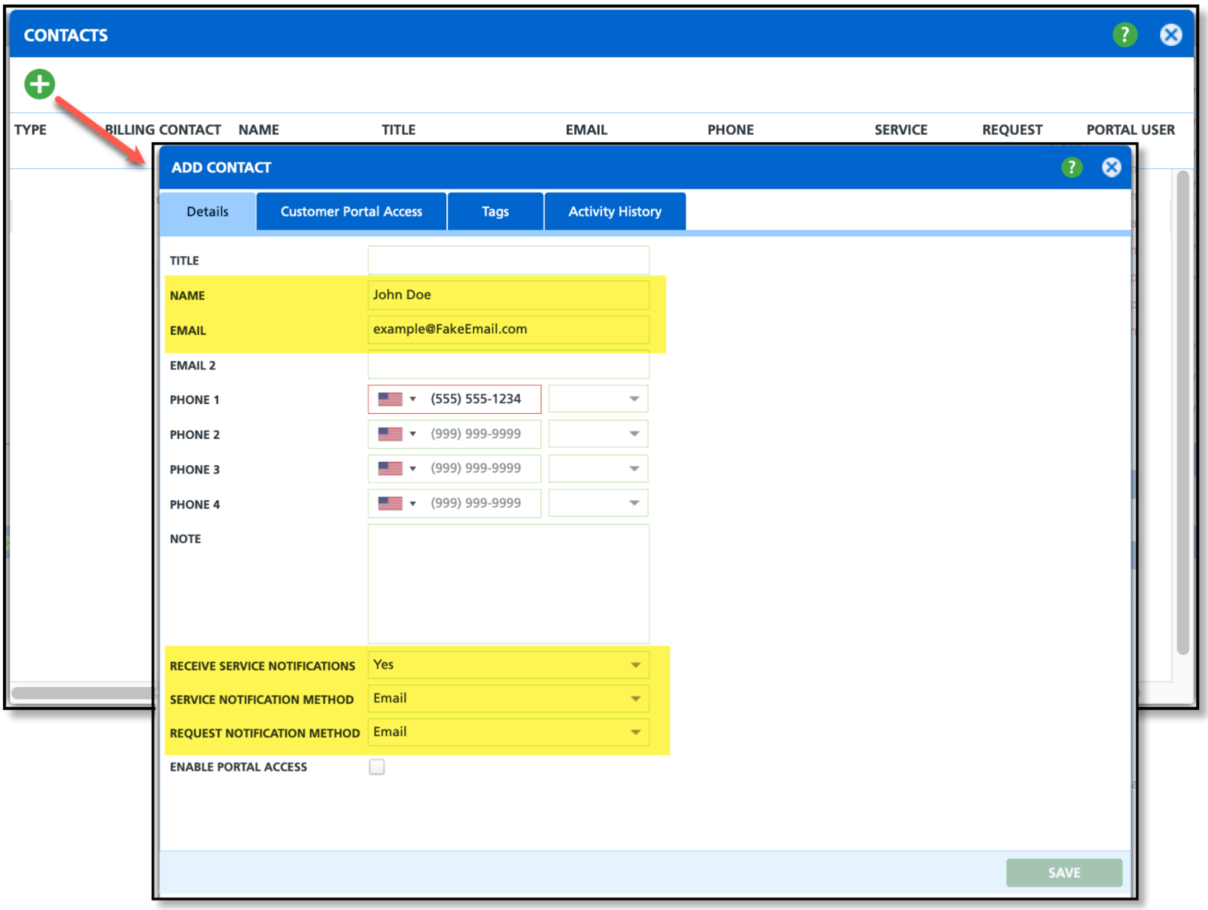
Tab: History

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

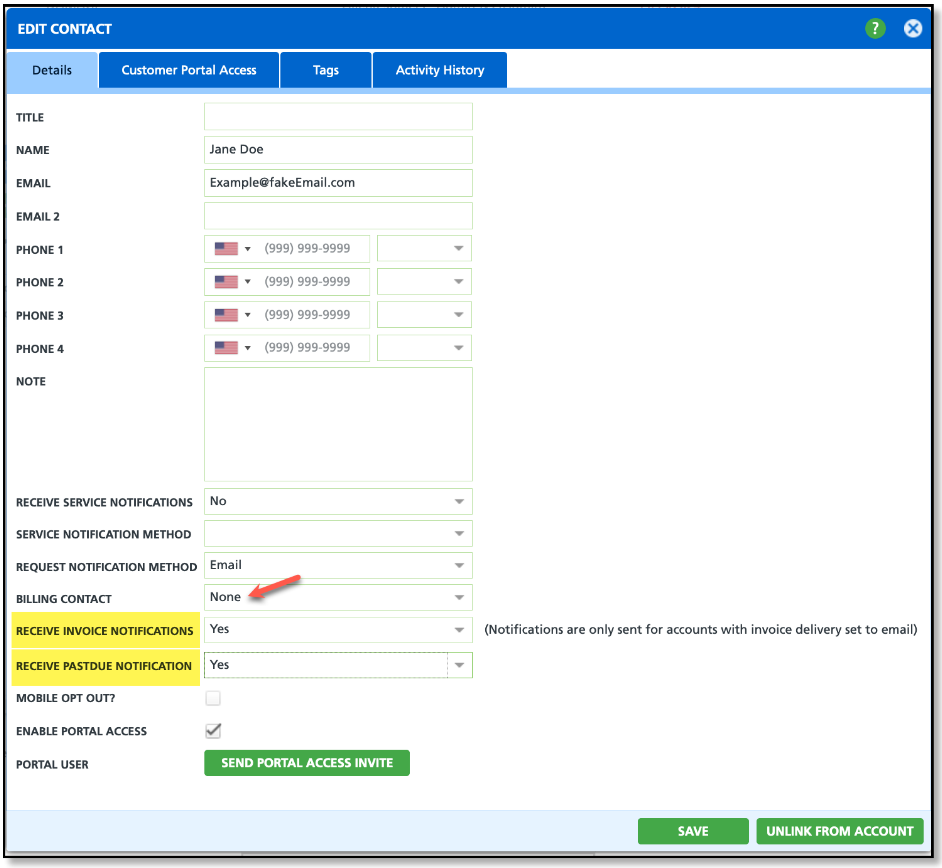
Add a non-billing contact to an account for handling non-billing inquiries.
Review the fields highlighted in yellow on this image. Required fields for a contact are name and either an email or a phone number that the contact can be reached at. Review additional fields and determine if the contact should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



Allow a Non-Billing Contact to Receive Billing Notifications

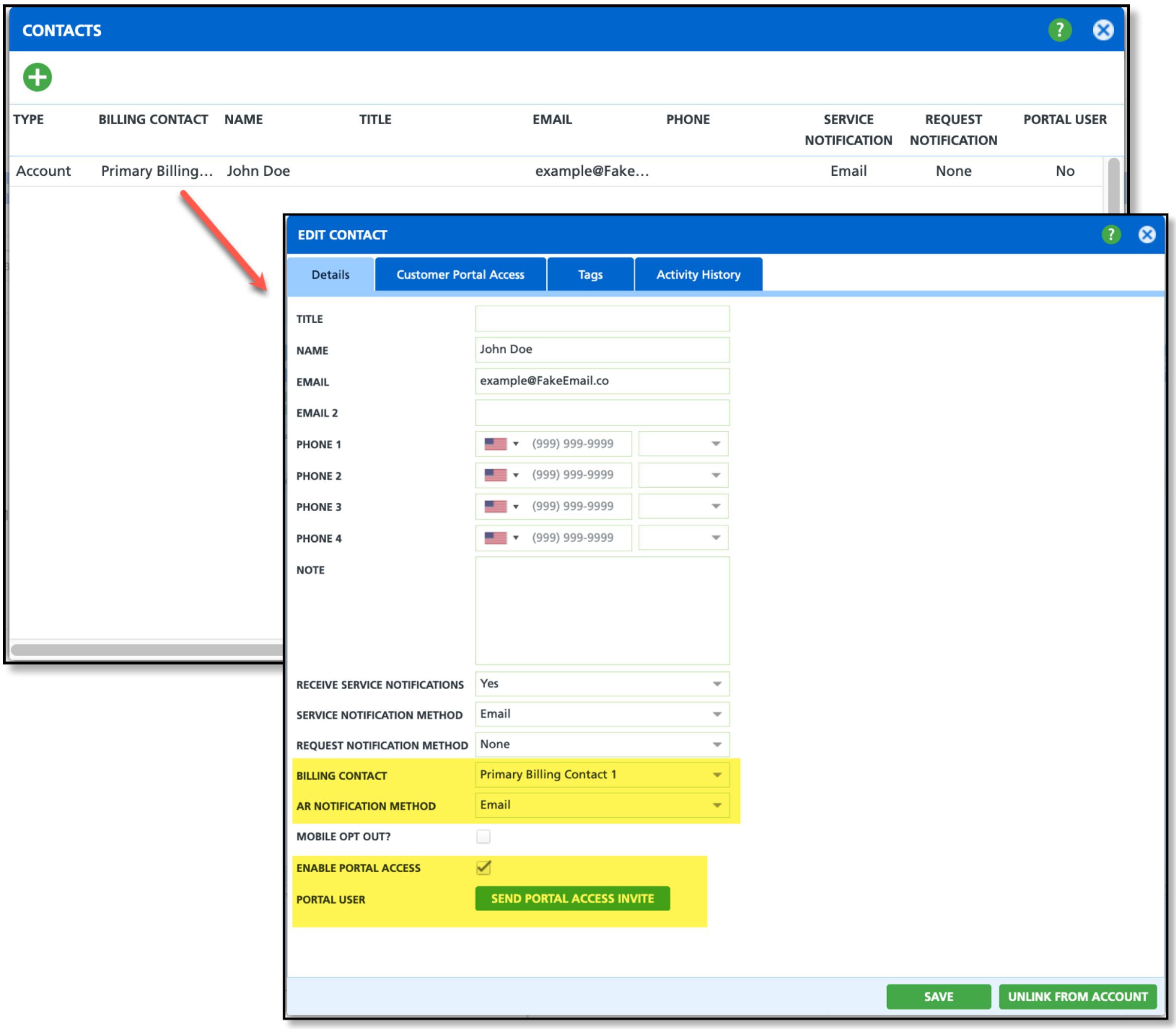
Settings are available to send invoice and past-due notifications to non-billing contacts on an account. The requirements for this include:

- 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.



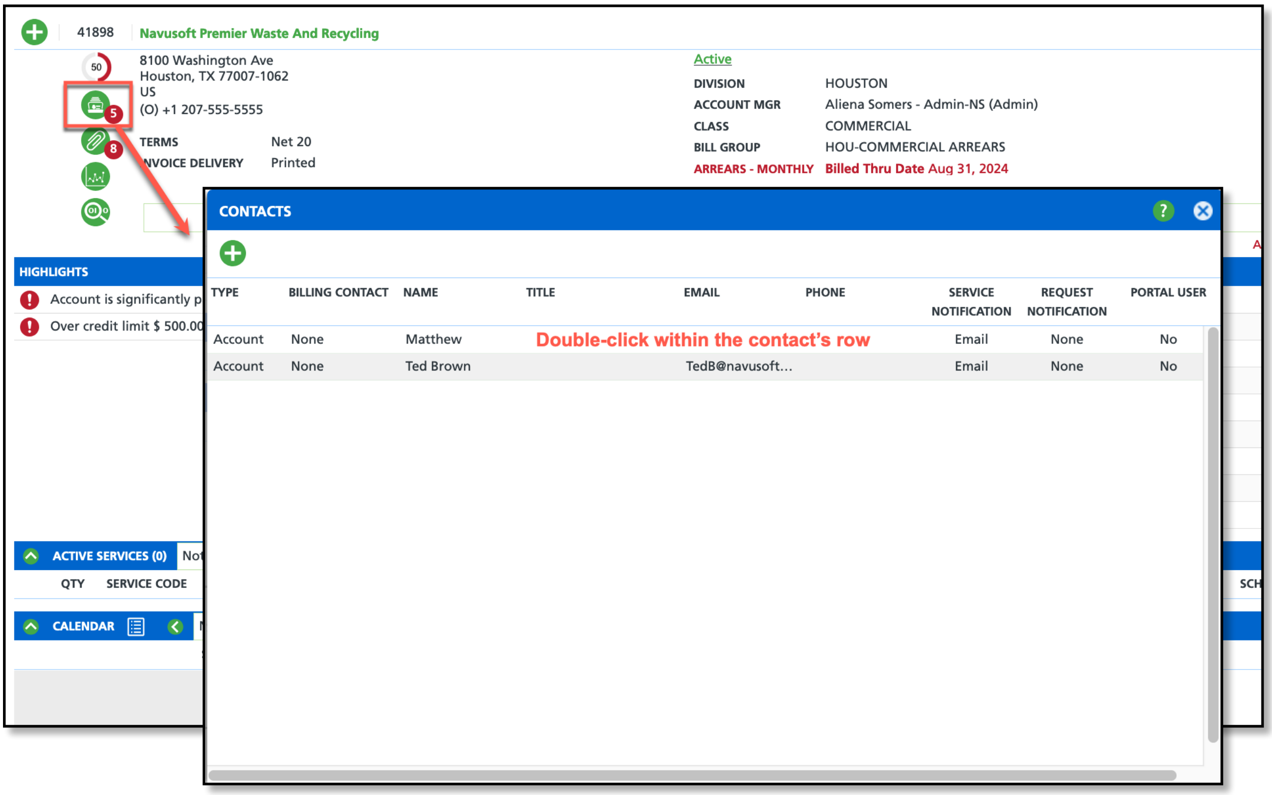
Add a Billing Contact

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.



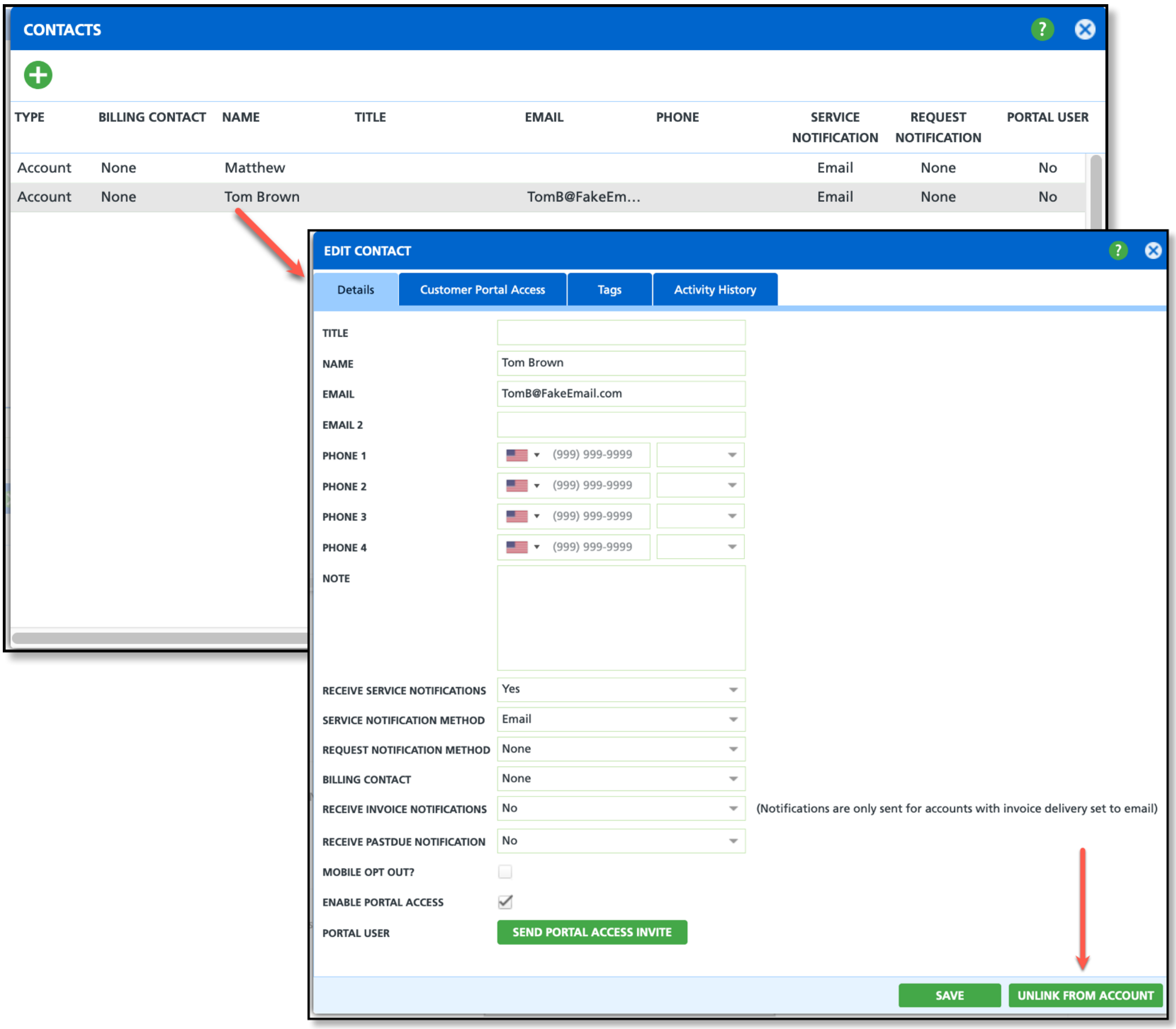
Edit an Existing Contact

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.



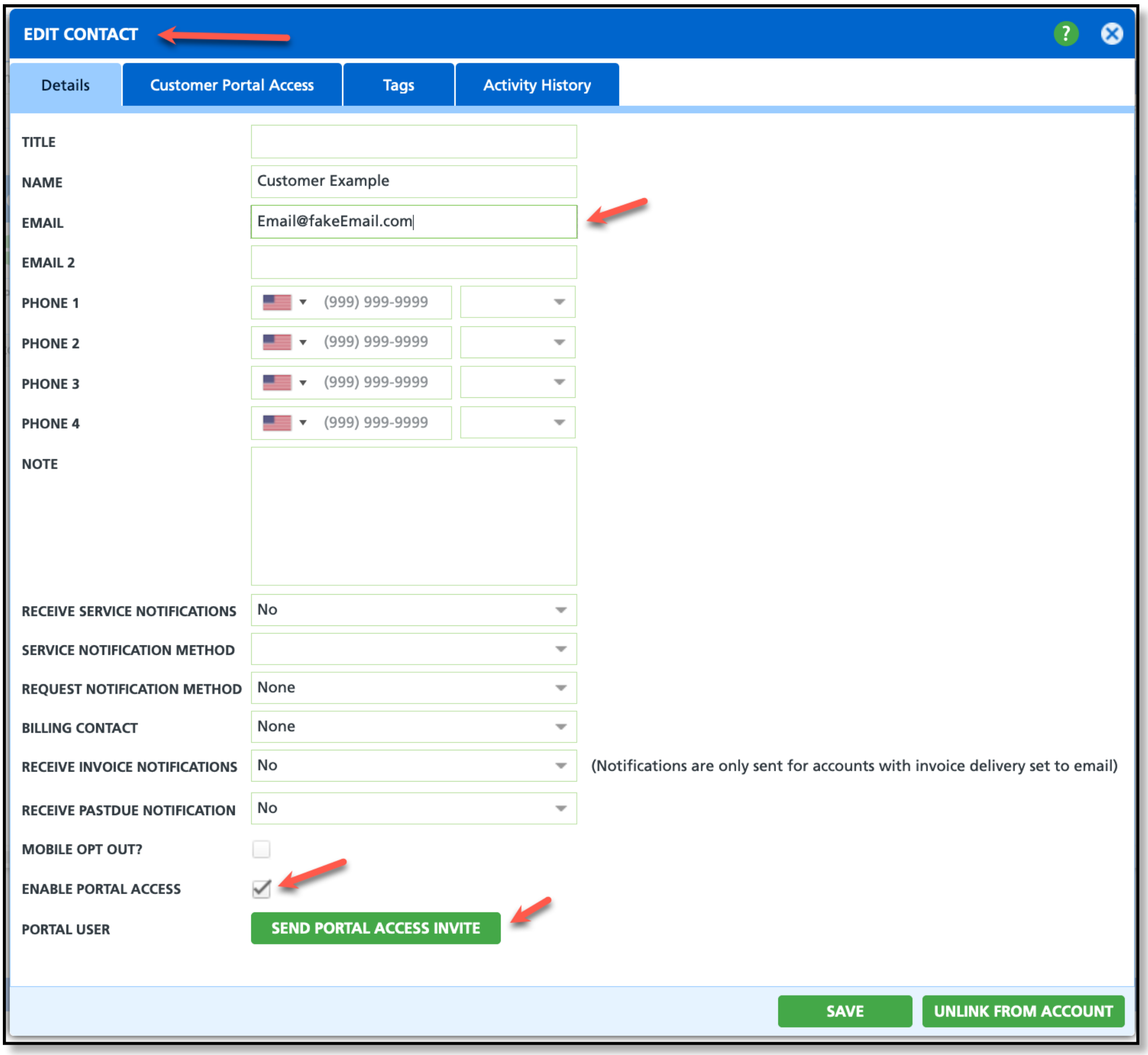
Granting Customer Portal Access to Contacts

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

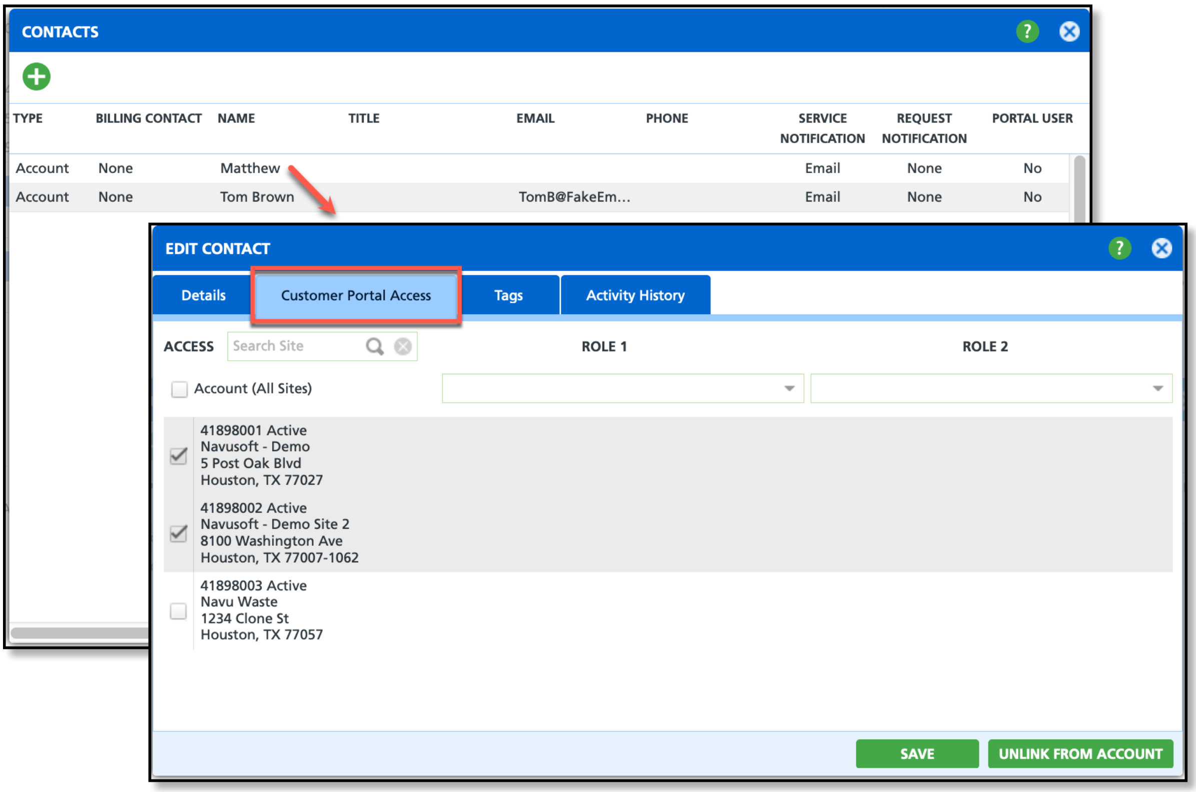
Details (Tab)

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.

Related Articles

Setting Up Customer Portal Access for Contacts
Customer Portal Setup