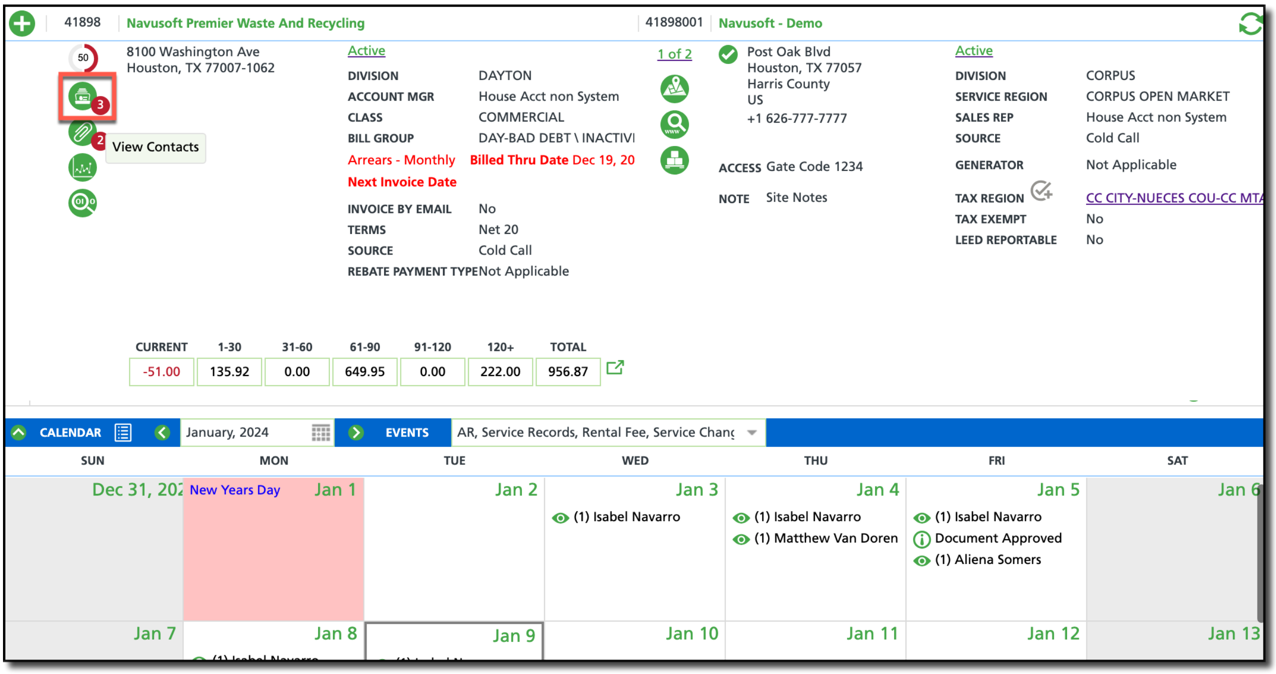
Add and Edit Account Contact

Last Modified on 09/10/2024 11:07 am EDT

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.



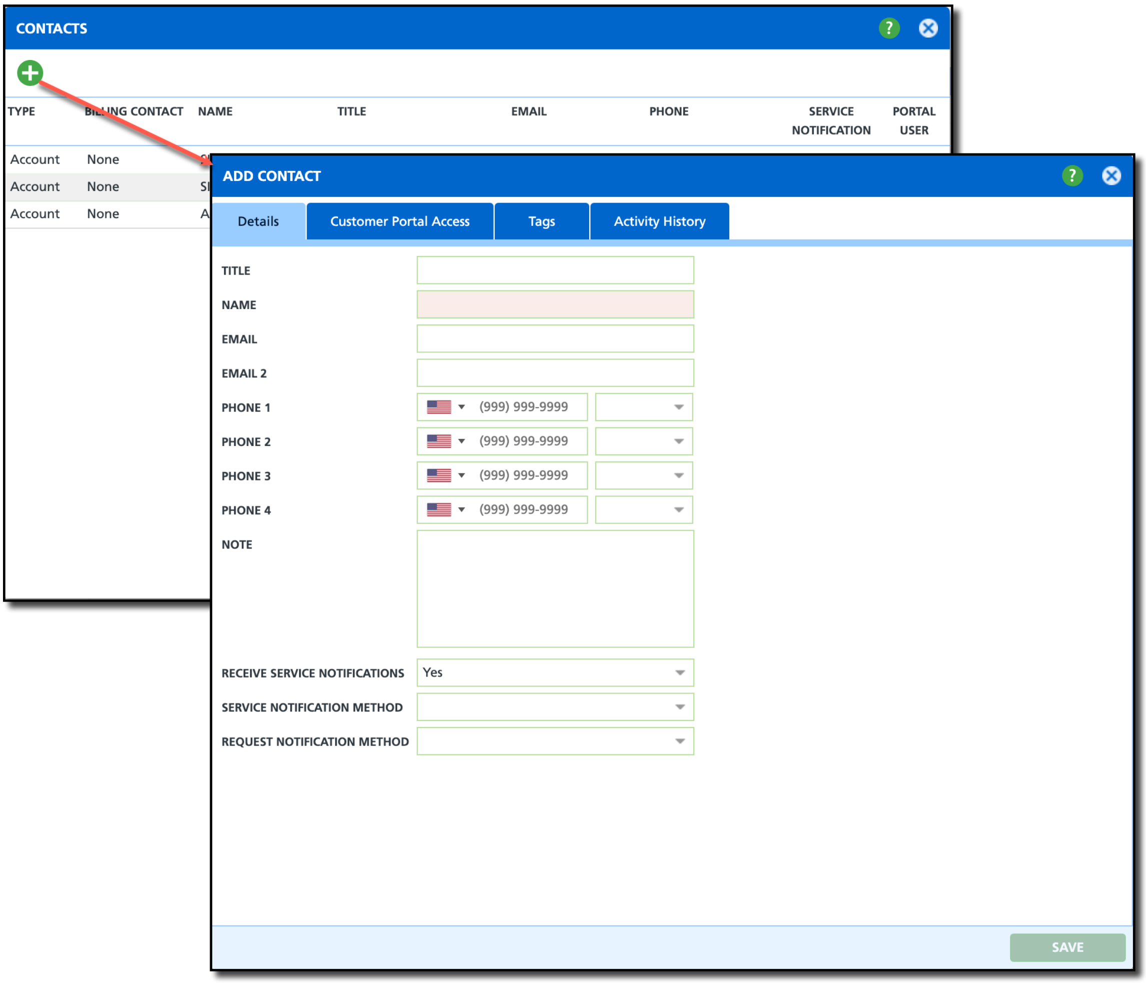
Permissions

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

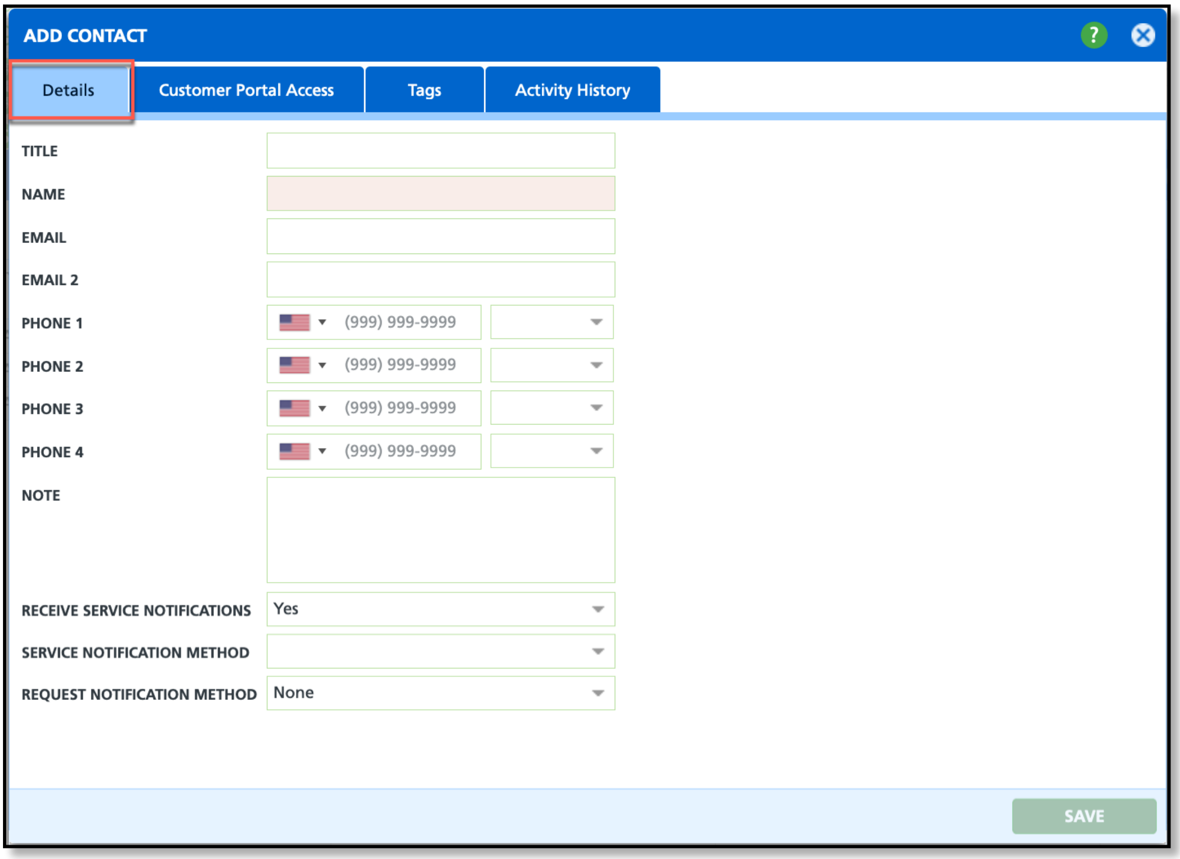
Add a New Contact

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.



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.
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.

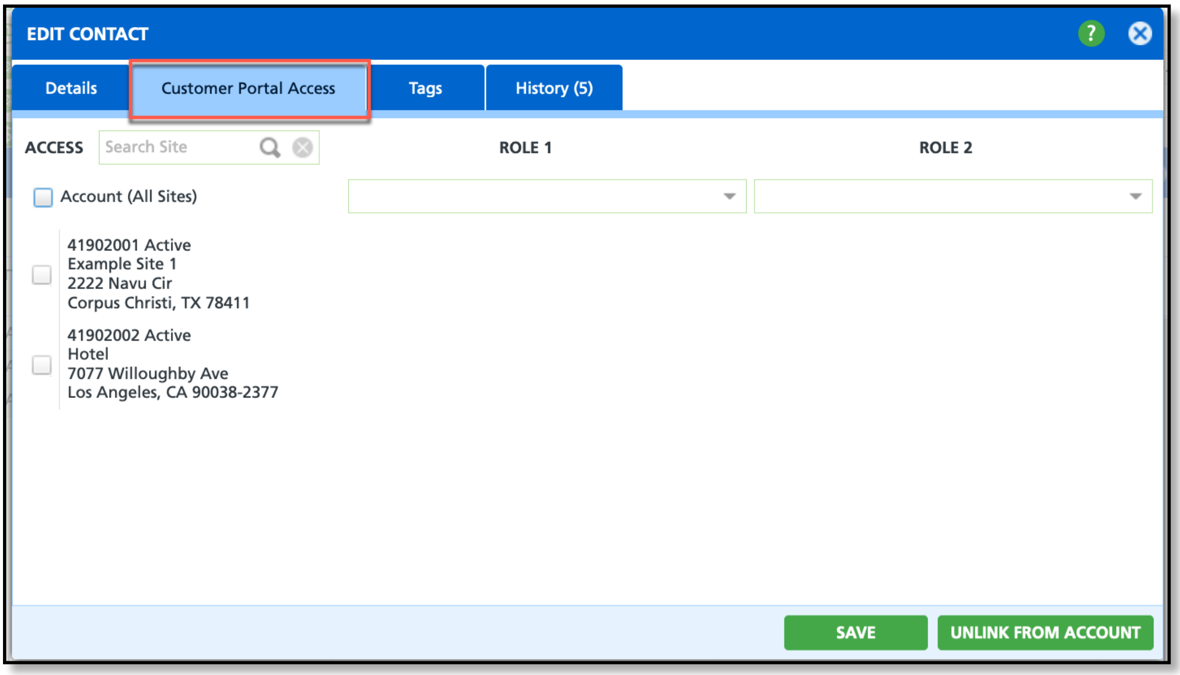
Notification Settings

Notification Setting	Description
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 a non-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 a non-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

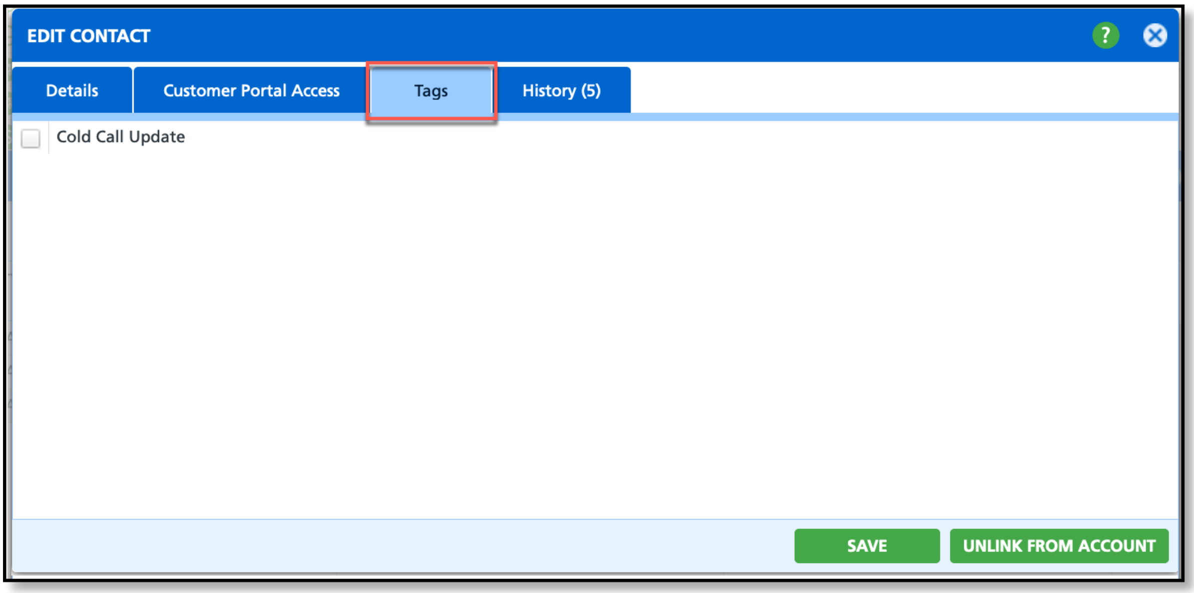
The Customer Portal Access tab designates which sites a contact on the account should have portal access to.



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.

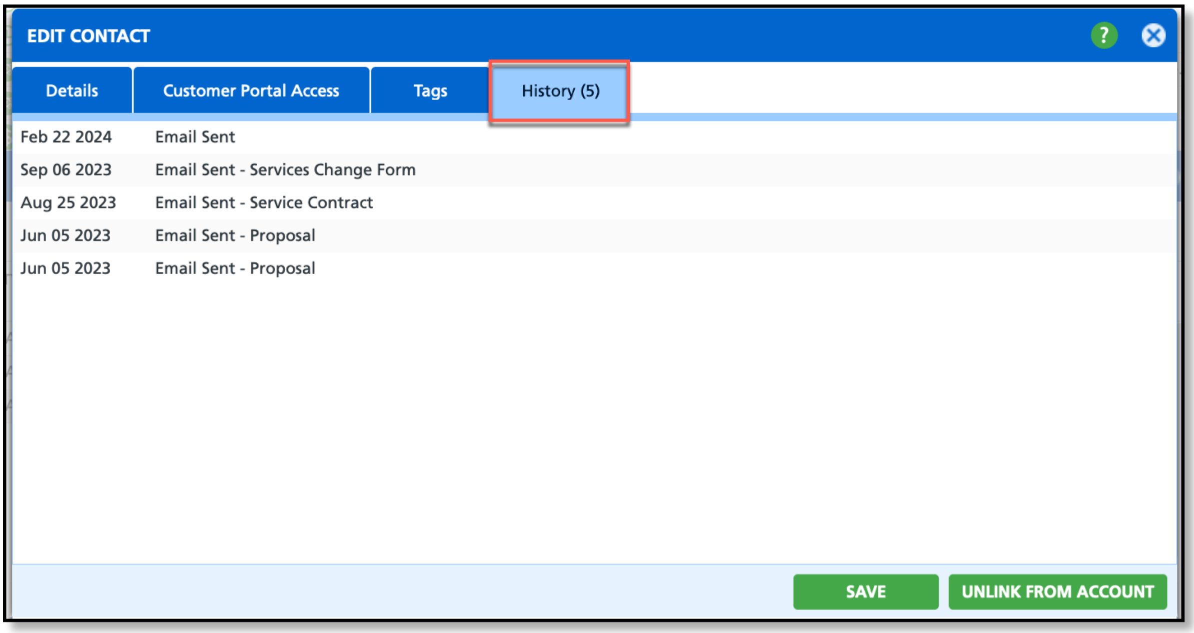
Tab: Tags

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



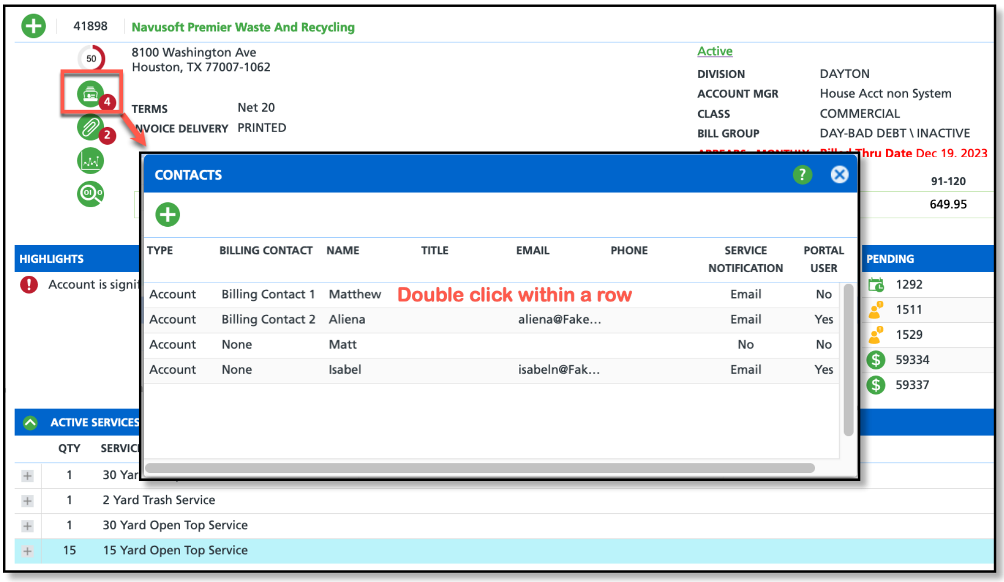
Tab: History

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.



Edit an Existing Contact

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



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.