

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.

41898		Navusoft Premier Waste And Recycling		41898001		Navusoft - Demo															
<div> <div>50</div> <div> </div> <div>View Contacts</div> </div>		8100 Washington Ave Houston, TX 77007-1062 Active DIVISION DAYTON ACCOUNT MGR House Acct non System CLASS COMMERCIAL BILL GROUP DAY-BAD DEBT \ INACTIV Arrears - Monthly Billed Thru Date Dec 19, 20 Next Invoice Date INVOICE BY EMAIL No TERMS Net 20 SOURCE Cold Call REBATE PAYMENT TYPERe Not Applicable		<div> <div>1 of 2</div> <div> </div> </div> ✓ Post Oak Blvd Houston, TX 77057 Harris County US +1 626-777-7777 ACCESS Gate Code 1234 NOTE Site Notes		Active 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 MTX TAX EXEMPT No LEED REPORTABLE No															
<table border="1"> <thead> <tr> <th>CURRENT</th> <th>1-30</th> <th>31-60</th> <th>61-90</th> <th>91-120</th> <th>120+</th> <th>TOTAL</th> </tr> </thead> <tbody> <tr> <td>-51.00</td> <td>135.92</td> <td>0.00</td> <td>649.95</td> <td>0.00</td> <td>222.00</td> <td>956.87</td> </tr> </tbody> </table>								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
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-51.00	135.92	0.00	649.95	0.00	222.00	956.87															

CALENDAR

< January, 2024 >

EVENTS

AR, Service Records, Rental Fee, Service Chanç

SUN	MON	TUE	WED	THU	FRI	SAT
Dec 31, 2023	New Years Day Jan 1	Jan 2	Jan 3	Jan 4	Jan 5	Jan 6
		(1) Isabel Navarro	(1) Isabel Navarro (1) Matthew Van Doren	(1) Isabel Navarro (1) Aliena Somers	(1) Document Approved	
Jan 7	Jan 8	Jan 9	Jan 10	Jan 11	Jan 12	Jan 13

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.

CONTACTS

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TYPE	BILLING CONTACT	NAME	TITLE	EMAIL	PHONE	SERVICE NOTIFICATION	PORTAL USER
Account	None						
Account	None	S					
Account	None	A					

ADD 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

(999) 999-9999

(999) 999-9999

(999) 999-9999

(999) 999-9999

Yes

SAVE

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

PHONE 2

PHONE 3

PHONE 4

NOTE

RECEIVE SERVICE NOTIFICATIONS

SERVICE NOTIFICATION METHOD

REQUEST NOTIFICATION METHOD

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</p> <p><i>Only displays on Edit Contact screen</i></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</p> <p><i>Only displays on Edit Contact screen</i></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.

EDIT CONTACT

Details **Customer Portal Access** Tags History (5)

ACCESS Search Site

ROLE 1 **ROLE 2**

☒ 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

SAVE **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.

The screenshot shows the 'EDIT CONTACT' form with four tabs: 'Details', 'Customer Portal Access', 'Tags', and 'History (5)'. The 'Tags' tab is currently selected and highlighted with a red box. Below the tabs, there is a single tag labeled 'Cold Call Update' with a checkbox to its left. At the bottom right of the form, there are two green buttons: 'SAVE' and 'UNLINK FROM ACCOUNT'.

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.

The screenshot shows the 'EDIT CONTACT' form with the 'History (5)' tab selected and highlighted with a red box. The history table below the tabs contains the following data:

Date	Description
Feb 22 2024	Email Sent
Sep 06 2023	Email Sent - Services Change Form
Aug 25 2023	Email Sent - Service Contract
Jun 05 2023	Email Sent - Proposal
Jun 05 2023	Email Sent - Proposal

At the bottom right of the form, there are two green buttons: 'SAVE' and 'UNLINK FROM ACCOUNT'.

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.

The screenshot shows a web application interface for managing contacts. At the top, there is a blue header bar labeled 'CONTACTS' with a green '+' icon and a close button. Below the header, a table lists contact columns: TYPE, BILLING CONTACT, NAME, TITLE, EMAIL, PHONE, SERVICE, REQUEST, and PORTAL USER. An 'ADD CONTACT' modal window is open, displaying a form with the following fields:

- TITLE: (empty text field)
- NAME: John Doe
- EMAIL: example@FakeEmail.com
- EMAIL 2: (empty text field)
- PHONE 1: (555) 555-1234
- PHONE 2: (999) 999-9999
- PHONE 3: (999) 999-9999
- PHONE 4: (999) 999-9999
- NOTE: (empty text area)
- RECEIVE SERVICE NOTIFICATIONS: Yes
- SERVICE NOTIFICATION METHOD: Email
- REQUEST NOTIFICATION METHOD: Email
- ENABLE PORTAL ACCESS: ☐

A 'SAVE' button is located at the bottom right of the modal.

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

Jane Doe

EMAIL

Example@fakeEmail.com

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

No

SERVICE NOTIFICATION METHOD

REQUEST NOTIFICATION METHOD

Email

BILLING CONTACT

None

RECEIVE INVOICE NOTIFICATIONS

Yes

RECEIVE PASTDUE NOTIFICATION

Yes

MOBILE OPT OUT?

ENABLE PORTAL ACCESS

PORTAL USER

SEND PORTAL ACCESS INVITE

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

SAVE

UNLINK FROM ACCOUNT

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.

CONTACTS

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TYPE	BILLING CONTACT	NAME	TITLE	EMAIL	PHONE	SERVICE NOTIFICATION	REQUEST NOTIFICATION	PORTAL USER
Account	Primary Billing...	John Doe		example@Fake...		Email	None	No

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

AR NOTIFICATION METHOD

MOBILE OPT OUT?

ENABLE PORTAL ACCESS

PORTAL USER

SEND PORTAL ACCESS INVITE

SAVE

UNLINK FROM ACCOUNT

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.

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41898

Navusoft Premier Waste And Recycling

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

Active

TERMS

Net 20

INVOICE DELIVERY

Printed

DIVISION

HOUSTON

ACCOUNT MGR

Aliena Somers - Admin-NS (Admin)

CLASS

COMMERCIAL

BILL GROUP

HOU-COMMERCIAL ARREARS

ARREARS - MONTHLY

Billed Thru Date Aug 31, 2024

HIGHLIGHTS

Account is significantly p

Over credit limit \$ 500.00

ACTIVE SERVICES (0)

QTY SERVICE CODE

CALENDAR

CONTACTS

TYPE	BILLING CONTACT	NAME	TITLE	EMAIL	PHONE	SERVICE NOTIFICATION	REQUEST NOTIFICATION	PORTAL USER
Account	None	Matthew	Double-click within the contact's row			Email	None	No
Account	None	Ted Brown		TedB@navusoft...		Email	None	No

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

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

RECEIVE PASTDUE NOTIFICATION

MOBILE OPT OUT?

ENABLE PORTAL ACCESS

PORTAL USER

SEND PORTAL ACCESS INVITE

SAVE

UNLINK FROM 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.

EDIT CONTACT

?

✕

Details

Customer Portal Access

Tags

Activity History

TITLE

NAME

Customer Example

EMAIL

Email@fakeEmail.com

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

No

SERVICE NOTIFICATION METHOD

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

SEND PORTAL ACCESS INVITE

SAVE

UNLINK FROM ACCOUNT

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.

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

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

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](#)