

Add Account Contact

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Pathway: *Customer > Search > Accounts*

This article details the process of adding a new contact to an existing account and editing contact information for contacts already on an account.

The screenshot displays the 'Cornerstone Construction' account page. At the top left, the account number '33171' and name 'Cornerstone Construction' are shown. Below this, the address 'PO BOX 12345 SAN ANTONIO, TX 78265-4810' is listed. A '50' icon with a red box and arrow points to the 'Add Contact' icon in the account header. To the right, account details include 'Active' status, 'DIVISION: CORPUS', 'ACCOUNT MGR: Rob Schneider', 'CLASS: COMMERCIAL', and 'BILL GROUP: COR-COMMERCIAL'. A balance table shows 'CURRENT: -75.00' and other categories: '1-30: 0.00', '31-60: 0.00', '61-90: 0.00', '91-120: 160.14', and '120+: 75.00'. Below the account details is a table of 'ACTIVE SERVICES (3)'. The 'CONTACTS' section shows a table with columns: TYPE, BILLING CONTACT, NAME, TITLE, EMAIL, PHONE, SERVICE NOTIFICATION, and PORTAL USER. Two contacts are listed: 'Billing Contact 1' (Cornerstone Construc...) and 'Roger'. A red box and arrow highlight the '+' icon in the top right of the contacts table. Below the contacts table is the 'ADD CONTACT' form, which has tabs for 'Details', 'Customer Portal Access', 'Tags', and 'Activity History'. The form fields include: TITLE (Location Manager), NAME (Lori Spangle), EMAIL (Lori@fakeaccount.com), EMAIL 2, PHONE 1 ((555) 555-1222, Office), PHONE 2, PHONE 3, PHONE 4, NOTE, BIRTHDATE, RECEIVE SERVICE NOTIFICATIONS (Yes), and SERVICE NOTIFICATION METHOD. A 'SAVE' button is at the bottom right.

Create a New Contact

The following process applies when adding a new contact:

1. Select the filing icon from the customer's account.
2. Select the **green '+' icon** from the Contacts editor to display the **Add Contact** editor.

3. Select the **Details** tab (*Add Contact* editor).
4. Enter the contacts **Name** and contact information.
5. Select **Yes** if they would like to receive service notifications for all accounts they are a contact for.
6. Select **Save**.
7. Select the **Customer Portal Access** tab.
8. Remove the selection from **Account (All Sites)** if the contact is **ONLY** a contact for a specific site and not all sites under the account.
 - If this is a billing contact for the account, leaving the Account box selected will populate a Billing Contact field in the Details tab. Refer back to the Details tab to indicate if they are a billing contact 1 or 2.
9. Select the site the person is a contact for.
10. Select **Save**.

Edit an Existing Contact

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

1. Select the filing icon from the customer's account.
 2. Select the **green '+' icon** from the Contacts editor to display the **Add Contact** editor.
 3. Edit the contacts information in the desired fields.
 4. Select **Save** when finished.
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