Add Account Contact

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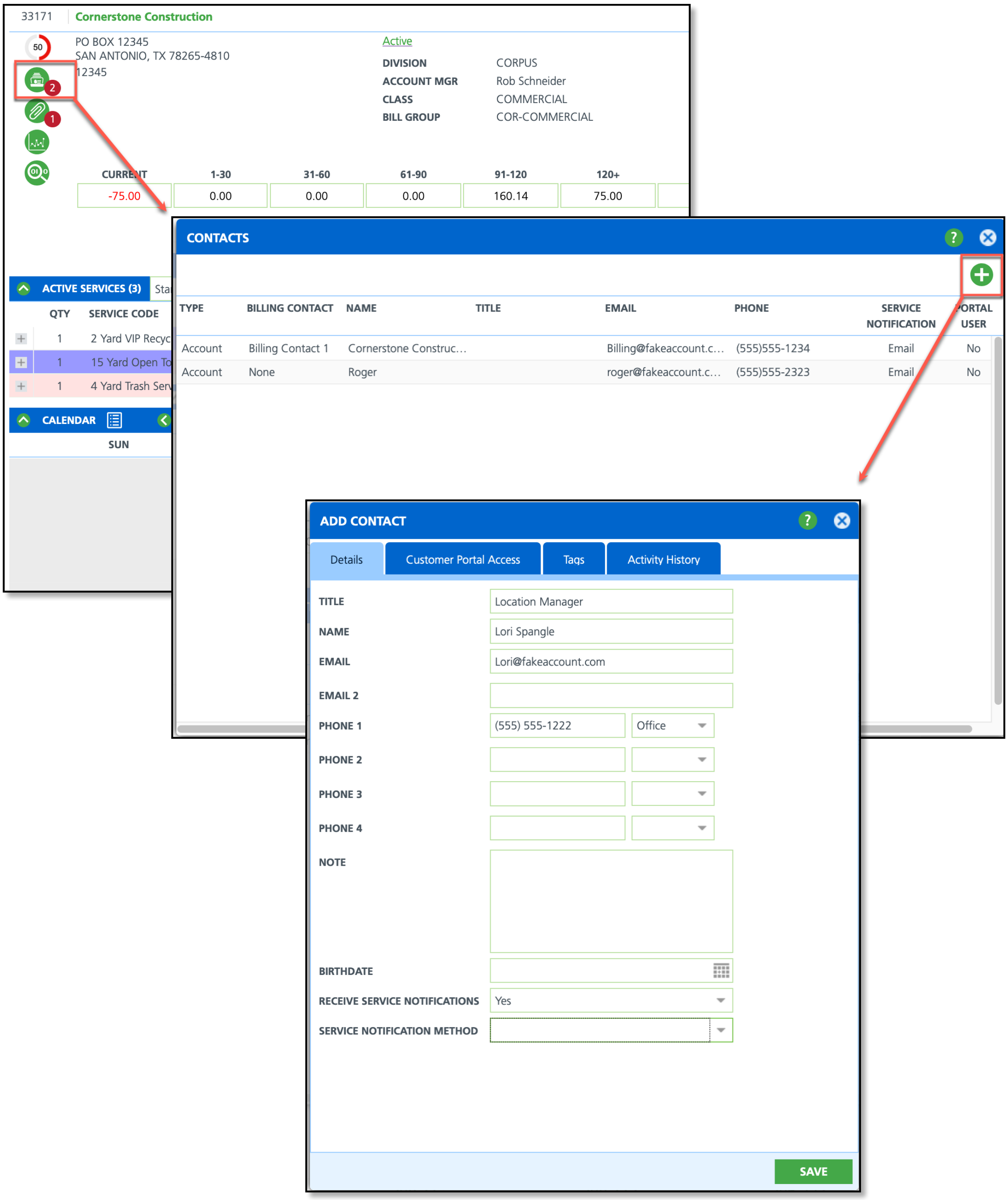
Pathway: *Customer > Search > Accounts*

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



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 the 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.