

How to Add an Entity Contact on any Entity Type

Once an entity is saved, an entity contact will be created as well and will become the default contact.

Here is how to Add Another Contact on Contacts tab:

- 1. Open the entity record.
- 2. Click the **Contacts** tab then click **Insert** button
- 3. Enter the necessary details on the screen. Note that **Full Name** fields are required

- 4. Click the **Save** toolbar button
- 5. The created contact will be available on the selection of default contact on **Entity** tab.
- 6. When the created contact is selected, **Contact Name**, **Suffix**, **Phone**, **Email**, **Mobile**, and **Contact Information** fields will be updated as well.

Field	Description
Full Name	The first and last name of the contact
Email (username)	The contacts Email address which is also their Username to log into the Customer Portal
Title	The contacts Title at the company
Phone and Mobie	Phone and Mobile number for the contact
Location Name	The contacts Location Name (Selected from the Locations tab)
Address City Zip State Country Time Zone	Data will come from selected location
Timezone	The timezone the contact is in. This will be important when using the help desk so we know what timezone the contact is in.
Contact Method	This is the contacts preferred method of communication. The Drop-down options will be (Email, Phone, Email or Phone). This information needs to appear on the HelpDesk > Transactions > Tickets screen for this contact.
Department	The contact's department
Email Distribution	Enables the email sending the selected transaction types
Type	Used to determine the contact type, for CRM
Notes	General Notes for the contact.
User Portal Settings Enable	Enables/Disabled global access to the Customer Portal. This should be disabled by default. When it's disabled the "Portal Permissions" tab, "Email Login" button and "Change Password" buttons should be hidden. When enabled those buttons and tab are visible.
User Role	Selection of portal user roles
Portal URL	Link to portal url

Here is how to Add Another Contact on Contacts tab:

1. Open the entity record.
2. Click the **Contacts** tab then click **Insert** button

Entity - 104-Ent

New Save Search Refresh Delete Undo Additional ▾ Close

Entity Customer Split Farm Locations **Contacts** Comments (0) History Attachments (0) Messages Custom Audit Log (1)

+ Insert Open X Remove Email Login Layout Filter Records (F3)

	Email (username)	Title	Phone	Mobile	Location Name	Timezone	Portal Access	Active
<input type="checkbox"/>	104-Ent	104-Ent@irely.com		123-456	104-Ent Location	(UTC-11:00) Coordina...	<input type="checkbox"/>	<input checked="" type="checkbox"/>

3. Enter the necessary details on the screen. Note that **Full Name** and **Timezone** fields are required

Entity Contact - 105-Ent

New Save Refresh Delete Undo Close

Detail Audit Log (1) Ent 1

Full Name: 105-Ent

Email (username): 105Ent@test.com

Title: test

Phone: 65-545-989 Mobile: 5844-45454

Timezone: (UTC-12:00) International Date Line West

Contact Method: Phone

Location Name: 104-Ent Location

Department: test

Type: Driver

Email Distribution:

Active: ☒

Notes:

User Portal Settings

Change Password Email Login

Portal Access: ☐ User Role:

Username: 105Ent@test.com

Portal URL: localhost/1610.228/21/

Contact Information

+ Insert X Remove Types

Type	Details
<input type="checkbox"/> Youtube	www.youtube.com

View

Saved

Page 1 of 1

4. Click **Save** toolbar button
5. The created contact will be available on the selection of default contact on **Entity** tab.

Entity - 104-Ent

New Save Search Refresh Delete Undo Additional ▾ Close

Entity Customer Split Farm Locations **Contacts** Comments (0) History Attachments (0) Messages Custom Audit Log (1)

Name: 104-Ent Phone: 123-456

Contact Name: 104-Ent Email: 104-Ent@irely.com

105-Ent 104-Ent Location Origination Date: 03/28/2016

104-Ent 104-Ent address

Zip/Postal: 46772 City: MONROE

State/Province: IN Country: United States

Contact Information

+ Insert X Remove Types

Type	Details
<input type="checkbox"/>	

- When the created contact is selected, **Contact Name, Phone, Email, Mobile, Timezone** and **Contact Information** fields will be updated as well.

Here is how to Add Another Contact on **Contacts** tab:

- Open the entity record.
- Click the **Contacts** tab then click **Insert** button

- Enter the necessary details on the screen. Note that **Full Name** field is required

- Click **Save** toolbar button

5. The created contact will be available on the selection of default contact on **Entity** tab.

Entity - 115-Ent

New Save Search Refresh Delete Undo Additional Close

Entity Customer Split Farm Locations Contacts Comments (0) History Attachments (0) Messages Audit Log (1)

Name: 115-Ent Entity No: 0001005008

Contact Name: 115-Ent Email: 115-Ent@irely.com Phone: 123-456

115-Ent

115b-Ent

Address: 115-Ent address

Zip/Postal: 46772 City: MONROE

State/Province: IN Country: United States

Alt Phone: 789-012 Alt Email: -----

Entity Type

+ Insert X Remove

☐ Entity Type

☐ Customer

6. When the created contact is selected, **Contact Name, Phone, Email, Mobile, Alt Phone, Alt Email and Timezone** and fields will be updated as well.

Entity - 115-Ent

New Save Search Refresh Delete Undo Additional Close

Entity Customer Split Farm Locations Contacts Comments (0) History Attachments (0) Messages Audit Log (1)

Name: 115-Ent Entity No: 0001005008

Contact Name: 115b-Ent Email: 115b-Ent@test.com Phone: 444-55-55

Location Name: 115-Ent Location

Address: 115-Ent address

Zip/Postal: 46772 City: MONROE

State/Province: IN Country: United States

Alt Phone: 444-55-56 Alt Email: test@test.com

Mobile: 09061234567 Fax: -----

Website: -----

Timezone: (UTC-11:00) Coordinated Universal Time-11

Internal Notes:

Entity Type

+ Insert X Remove

☐ Entity Type

☐ Customer