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

Detail General C	RM Information Audit	Log	Additional I	nformaiton						
Full Name	* contact 01		Suffix	CC			User Porta	Settings		
litle	Contact 1		Nickname	Con	Add Phot	2	A Change F	assword	🖂 Email Login	
mail (username)	contact01@test.com						Enable	User Ro	le	
hone	(653) 233-326		2 Mobil	e (3632) 363-2	5454	ð	Username	contact	01@test.com	
ocation Name	test					\sim	Portal URL	bethnu	c/1830Dev/login?company=01	
ddress	Fort Washington Ave			0	Contact Inf	ormation	1			
lity	New York		State NY				+ Insert	× Remov	re 🖉 Types	
ip/Postal	1001		Country	United States			🗌 Туре*		Details*	
ime Zone	(UTC-04:00) Eastern	Dayligh	it Time							
ontact Method	Email or Phone	~	Dept	General						
mail Distribution	Invoices ×	~	Туре	General		~				
√otes	This is a sample cont	act for	this entity.							

- 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
Туре	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

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Open the entity record. Click the Contacts tab then click Insert butto

Entity Customer Sp	olit Farm Locations Cor	tacts Comments (0) History	Attachments (0)	M	essages Cu	stom Audit L	og (1)		
+ Insert Q Open >	K Remove 🖂 Email Login	密 Layout Q Filter Records	(F3)						
me	Email (username)	Title	Phone	Mobi	ile	Location Name	Timezone	Portal Acces	s
104-Ent	104-Ent@irely.com		123-456			104-Ent Locatio	n (UTC-11:00) Coordina		
nter the neces	ssary details on t	he screen. Note th	at Full Na	me	e and T	imezone	e fields are requ	uired	
Detail Audit Log (1)	Ent 1								
Full Name:	105-Ent				User Port	al Settings			
Email (username):	105ent@test.com		Add Phot	•	A Change	Password	Email Login		
Title:	test				Portal Acc	ess: Us	er Role:		
Phone:	65-545-989	Mobile: 5844-4545	4		Username	: 105ent@t	est.com		
	(UTC-12:00) Internationa	l Date Line West		\sim	Portal URI	.: localhost/	1610.228/i21/		
Timezone:			\sim						
Timezone: Contact Method:	Phone			Contact Information					
Timezone: Contact Method: Location Name:	Phone 104-Ent Location			~	1.1		4 -		
Timezone: Contact Method: Location Name: Department:	Phone 104-Ent Location test			~	+ Insert	× Remove	/ Types		
Timezone: Contact Method: Location Name: Department: Type:	Phone 104-Ent Location test Driver			~	+ Insert	X Remove	⊘ Types Details		Via
Timezone: Contact Method: Location Name: Department: Type: Email Distribution:	Phone 104-Ent Location test Driver			× × ×	+ Insert Type Youtu	X Remove	Types Details www.youtube.com		Vie
Timezone: Contact Method: Location Name: Department: Type: Email Distribution: Active:	Phone 104-Ent Location test Driver			 	+ Insert Type Youtu	X Remove	Types Details www.youtube.com		Vie

4. Click Save toolbar button

ne created cont	act will be available	on the sele	ction of	default	contact on Er	ntity	tab.			
ntity - 104-Ent										
New Save Search	Refresh Delete Undo	Additional - Cle	ose							
Entity Customer	Split Farm Locations	Contacts Cor	mments (0)	History	Attachments (0)	Mess	ages	Custom	Audit Lo	og (1)
Name:	104-Ent						Phone:	123-4	56	
Contact Name 🛛 🗸	104-Ent		E	Email: 🖂	104-Ent@irely.cor	n				
105-Ent	104-Ent Location		Originat	ion Date:	03/28/2016		Conta	act Infor	mation	
104-Ent	104-Ent address						+ Ins	sert X	Remove	🖉 Тур
							T	ype		Details
Zip/Postal:	46772	V City:	MO	NROE						
State/Province:	IN	Cour	trv: Uni	ted States		~				

6. When the created contact is selected, Contact Name, Phone, Email, Mobile, Timezone and Contact Information fields will be updated as well. Entity - 104-Ent

Entity Customer	Split Farm Loo	tations	Contacts	Comn	nents (0)	History	Attachments (0)	Mess	ages C	lustom	Audit Log (1)			
Name:	104-Ent								Phone:	65-54	5-989	Entity No:	0001005124	
Contact Name 🛛 🗸	105-Ent					Email: 🖂	105ent@test.com					Mobile:	5844-45454	
Location Name 🛛 🗸	104-Ent Location				Origina	tion Date:	03/28/2016		Conta	ct Infor	mation			
Address: 🔗	104-Ent address								+ Ins	ert X	Remove 🧷 Typ	es		
									🗌 Ту	/pe	Details			
Zip/Postal:	46772		~	City:	M	ONROE			□ Yo	outube	www.yo	utube.com		View
State/Province:	IN			Country	/: Un	ited States		~						
limezone:	(UTC-12:00) Intern	national Da	ate Line	West				~						
Print 1099:	1099 Name:								Entity	Туре				
1099 Form:								~	+ Ins	ert X	Remove			
1099 Type:								~	Entity Type					
Federal Tax ID:									🗌 Ci	ustomer				
W9 Signed:														
Internal Notes:														
									User F	Portal				
									Portal	Access:	Portal Admir	n:		Liser R

Here is how to Add Another Contact on Contacts tab:

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

	Entity - 115-Ent								^ □ X
	New Save Search	Refresh Delete Undo Addition	al - Close						
	Entity Customer	Split Farm Locations Contac	ts Comments (0)	History Attachn	nents (0) Me	ssages Audit Log (1)			
	+ Insert 🔍 Open	🗙 Remove 🖂 Email Login 🔡	Layout Q Filter	Records (F3)					
	Name	Email (username)	Title	Phone	Mobile	Location Name	Timezone	Portal Acce	Active
	115-Ent	115-Ent@irely.com		123-456		115-Ent Location	(UTC-11:00) Coo		✓
	115b-Ent	115b-Ent@test.com						~	~
I									

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

ntity Contact - 115b-E	nt					^ :			
New Save Refresh	Delete Undo E	mail Login (Change Pass	word Close					
Detail Audit Log (1)									
Full Name:	115b-Ent								
Email (username): 🖂	115b-Ent@test.co	15b-Ent@test.com Add Phot							
Title:	Test	est							
Phone:	444-55-55		Mobile:	09061234	4567				
Alt Phone:	444-55-56		Alt Emai	l: test@test	t.com				
Contact Method:	Email or Phone		✓ Fax:						
Location Name:	115b-Ent					\sim			
Contact Role:	Help Desk					~			
Active:	✓ Department:								
Portal Access:	✓ Timezone:	(UTC-11:00)	Coordinate	ed Universal T	lime-11	~			
Type:	Driver					~			
Notes:	Test								
Email Distribution:						~			
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4. Click Save toolbar button

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

Entity Customer	Split Farm Locations	Contacts (Comments (0)	History A	ttachments (0)	Messages	Audit Log (1)			
Name:	115-Ent							Entity No:	0001005008	
Contact Name	115-Ent		Email: 🖂 1	15-Ent@irely.	com			Phone:	123-456	
115-Ent										
115b-Ent	115-Ent Location					Entity	Entity Type			
Address: 🛇	115-Ent address					+ Ins	+ Insert X Remove			
						E	Entity Type			
						C C	ustomer			
Zip/Postal:	46772	v City:	MONRO	DE						
State/Province:	IN	Cou	ntry: United	States		~				
Als Diseases	700.010		maile							

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 Addition						
Entity Customer	Split Farm Locations Conta	cts Comm	ents (0) History Attachments (0) Me	ssages	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			Entity	Туре		
Address: 📎	115-Ent address			+ Ins	ert 🗙 Remove		
				Er	ntity Type		
7:= /D==t=li	46770	Citra	MONDOF	C	ustomer		
Zip/Postai:	40//2	City:	MONROE				
State/Province:	IN	Country:	United States Y				
Alt Phone:	444-55-56	Alt Email:	test@test.com				
Mobile:	09061234567	Fax:					
Website: P							
Timezone:	(UTC-11:00) Coordinated University	al Time-11	~				
Internal Notes:							
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