

How to Modify a Default Contact Role for a Contact List

Note: All the menus assigned to the Portal Admin will be cascaded to the contact list user role, except for the System Manager menu.

1. Login as a Portal Admin
2. On user's menu panel, expand the **System Manager** folder and click **User Roles**
3. Select the menus that should be included in the role:

The screenshot shows a web application window titled "User Role - Contact's Help Desk". The window has a menu bar with "New", "Save", "Search", "Undo", "Delete", "Duplicate", and "Close". Below the menu bar, there are two tabs: "Details" and "Audit Log (3)". The "Details" tab is active, showing a form with the following fields:

- Role Name:** "Contact's Help Desk"
- Role Type:** "Contact" (dropdown menu)
- Description:** "Default contact role."

Below the form, there is a "Menu Structure" section. It contains a "Master Menu" table with a "Filter Menu" input field. The table has the following rows:

Master Menu
<input checked="" type="checkbox"/> Select All <input type="checkbox"/> Clear All <input type="text" value="Filter Menu"/>
<input checked="" type="checkbox"/> Purchasing
<input checked="" type="checkbox"/> Grain
<input type="checkbox"/> Contract Management
<input type="checkbox"/> Scale
<input checked="" type="checkbox"/> Help Desk

To the right of the "Master Menu" table is a "Role Menu Preview" section, which displays a list of selected menus:

- Purchasing
- Grain
- Help Desk

4. Click the **Save** button