

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

The screenshot shows the 'Entity - 104-Ent' window. The 'Contacts' tab is selected, and the 'Insert' button is highlighted. The window displays a table with columns: Name, Email (username), Title, Phone, Mobile, Location Name, Timezone, Portal Access, and Active. A single record is visible with the following details:

Name	Email (username)	Title	Phone	Mobile	Location Name	Timezone	Portal Access	Active
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

The screenshot shows the 'Entity Contact - 105-Ent' window. The 'Detail' tab is selected, and the 'Ent 1' sub-tab is active. The window displays various fields for contact information, including:

- 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:**

On the right side, there are sections for **User Portal Settings** and **Contact Information**. The 'User Portal Settings' section includes fields for 'Portal Access', 'User Role', 'Username', and 'Portal URL'. The 'Contact Information' section includes a table with columns for 'Type' and 'Details'.

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

The screenshot shows the 'Entity - 104-Ent' window. The 'Entity' tab is selected, and the 'Contact Name' dropdown is open. The window displays a table with columns: Name, Email, Location Name, Origination Date, and Contact Information. A single record is visible with the following details:

Name	Email	Location Name	Origination Date	Contact Information
104-Ent	104-Ent@irely.com	104-Ent Location	03/28/2016	

The 'Contact Name' dropdown is open, showing the following options:

- 105-Ent
- 104-Ent
- 104-Ent address

The '105-Ent' option is highlighted. The 'Contact Information' section on the right includes a table with columns for 'Type' and 'Details'.

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

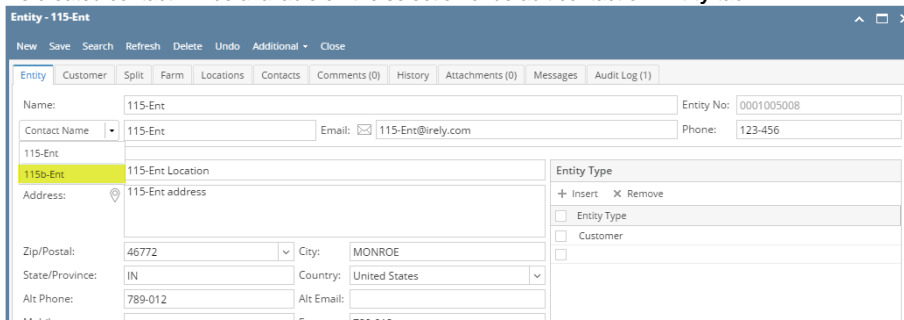
Here is how to Add Another Contact on **Contacts** tab:

- 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: -----

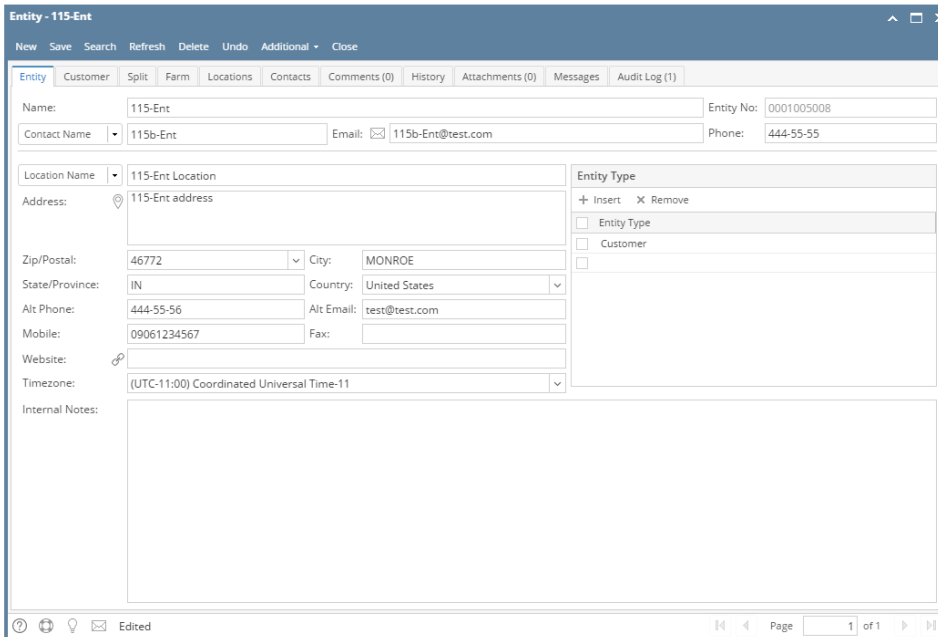
Entity Type

+ 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:

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