

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:

User Role - Contact's Help Desk

New Save Search Undo Delete Duplicate Close

Details Audit Log (3)

Role Name: Contact's Help Desk Role Type: Contact

Description: Default contact role.

Menu Structure

Master Menu

☒ Select All ☐ Clear All Filter Menu

☒ Purchasing

☒ Grain

☐ Contract Management

☐ Scale

☒ Help Desk

Role Menu Preview

☒ Purchasing

☒ Grain

☒ Help Desk

4. Click the **Save** button