Customer Contact List

The **Customer Contact List** contains all persons and entities that may be contacted for this Customer. Any contacts created on the Customer are available for contacting on any of the Customer's accounts.

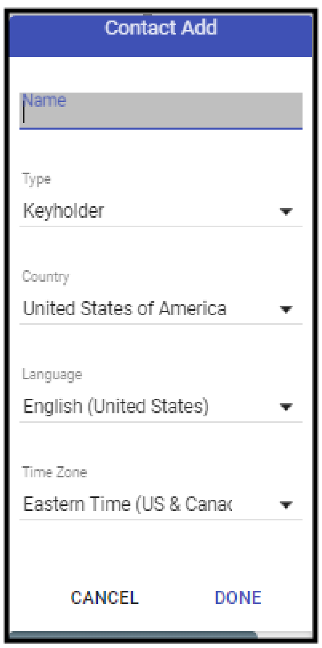
Contacts Card

The contacts card is where you add the individuals who respond to or manage the customer data.

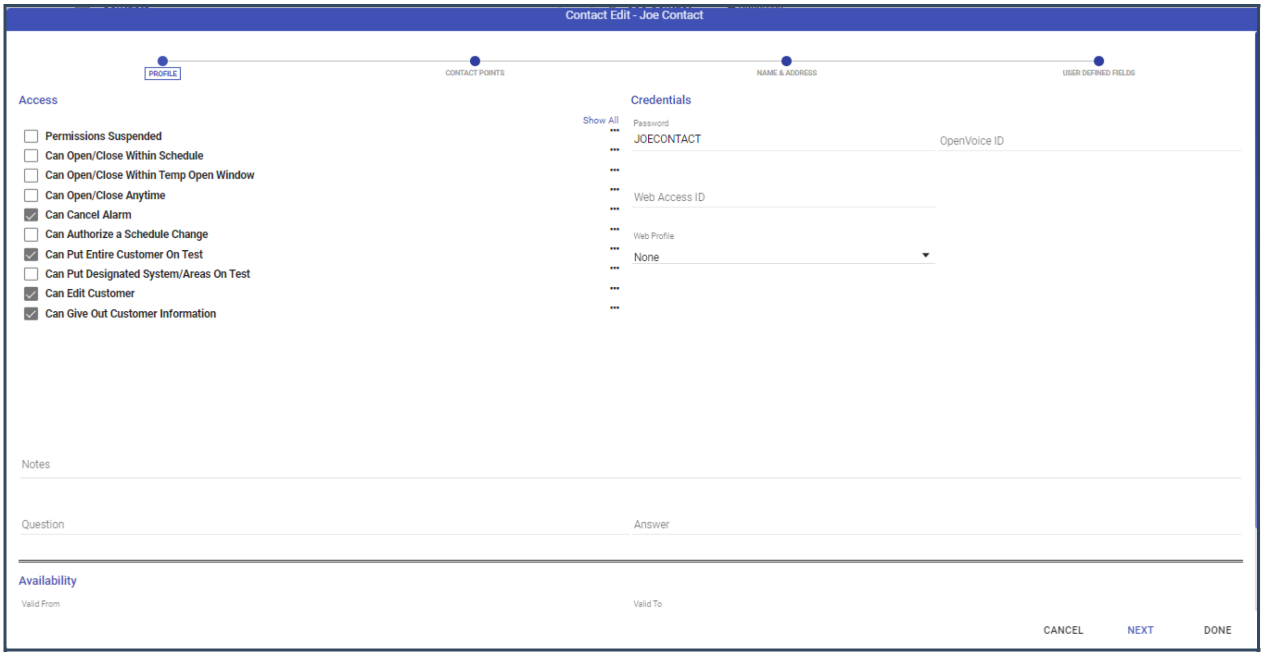
Adding a Contact

Click the Plus sign (?) and select the type of contact to Add.

Contact Add



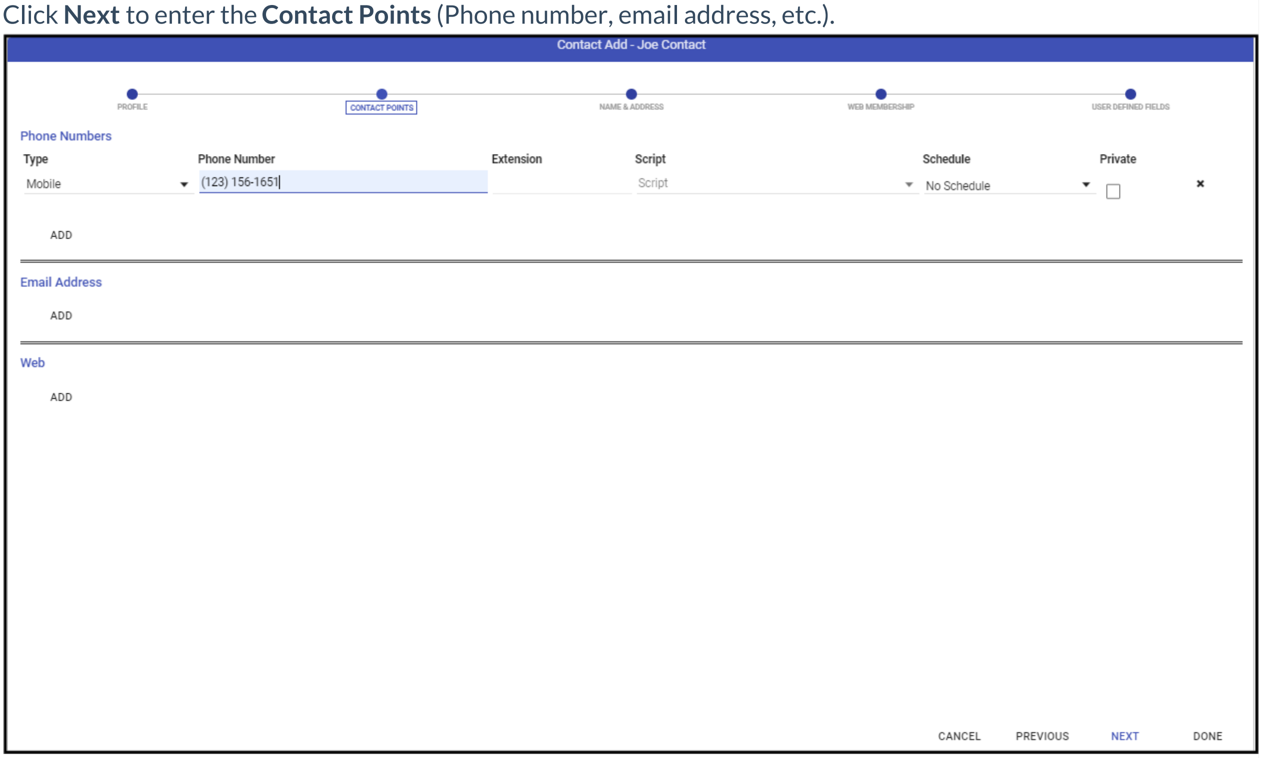
1. Enter the **Name** of the Contact - Be sure to enter First Name then Last Name as you would have someone read it.
2. Select the **Type** - Keyholder is the default. Keep it as a Keyholder unless specified by your organization. *Customer's may need to change this user to **Technician** to enable other external features.*
3. Verify the **Country**, **Language,** and **Time Zone**.
4. Click **Done**
5. This launches the **Advanced Edit.**



Enter any applicable data such as:

- **Contact Password**
- **Permissions** automatically load based on the data entered. You may update or change these at any time.
- **Web Access ID**
- **Notes**
- **Availability**

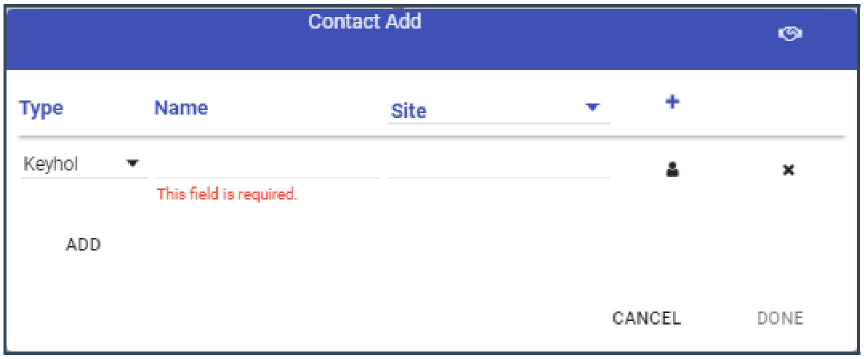
6. Click **Next** to enter the **Contact Points** (Phone number, email address, etc.).



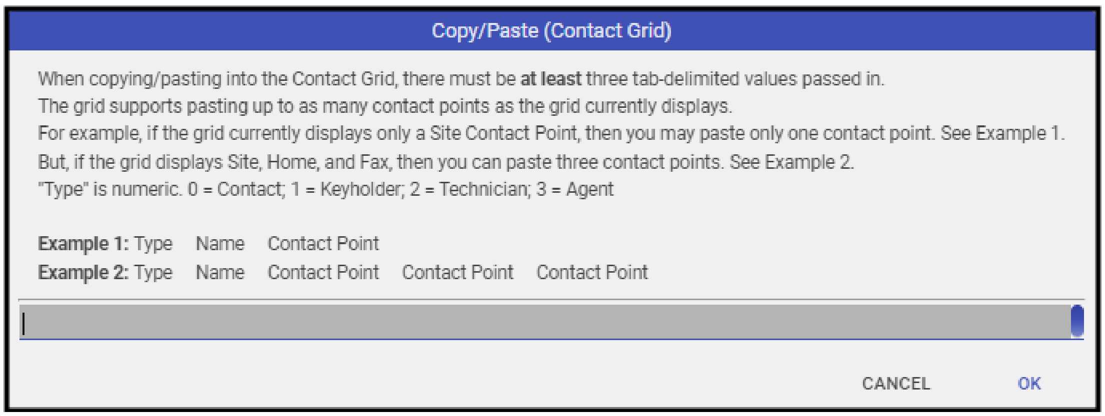
7. Click **Next** to add the contact's **Name and Address**, if required.
8. Click **Next** to select or enter data into any contact-specific **User-defined** fields.
9. When all is entered as desired, click **Done**.
10. **Repeat** as required for all contacts, or use the **Contact Grid**.

Contact Grid

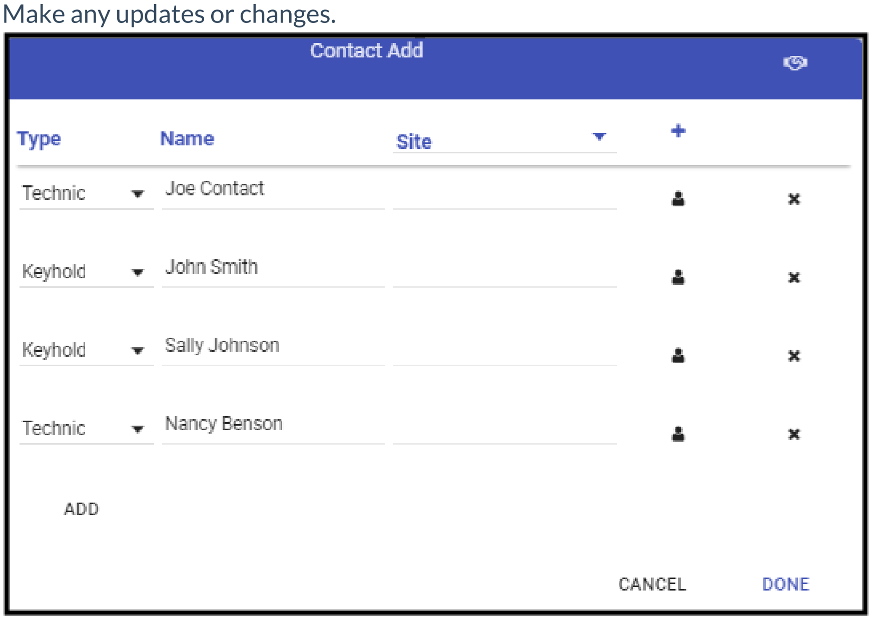
If you have multiple contacts to enter, Select **Contact Grid.**



1. Click **Add**
    1. If available, it is possible to **import** a, properly formatted listing of contacts, using the handshake icon 
    2. Copy and paste the values in the prescribed format.



3. Click **OK**.
4. Make any updates or changes.



5. Click **Done**.

2. If manually adding contacts to the list:
    1. Select the **Type**, if other than Keyholder
    2. Enter the **Name** of the first contact.
    3. Select the **Contact Point Type** in the header and then enter the number. If the person(s) have multiple numbers, click the **plus sign (▯)** to add more column contact type headers.
    4. Click **Add** and repeat for all contacts
3. You may click the **Advanced Edit** to enter all contact details, as noted **above**.
4. When all are entered as needed, click **Done**.

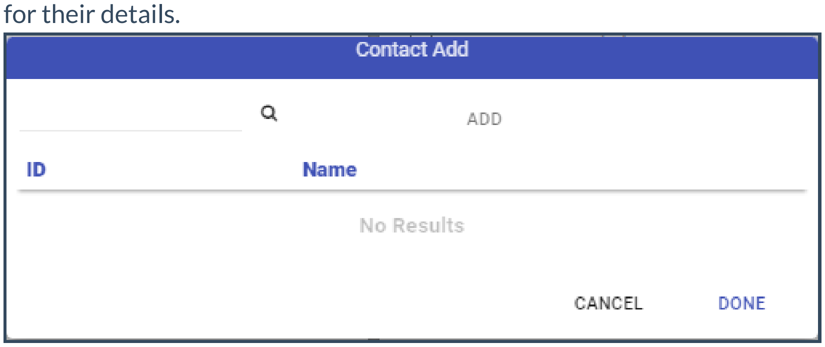
Please note: Contacts are ordered based on the order entered into the system. To change the order of who is listed, please drag and rearrange.

Deleting a Contact Person

1. Select the person to Delete
2. Locate the Trash Can (▯)icon.
3. Click the Trash Can.
4. Confirm Deletion
5. Repeat as Required.
6. Save (▯) the Record.

Global Keyholder

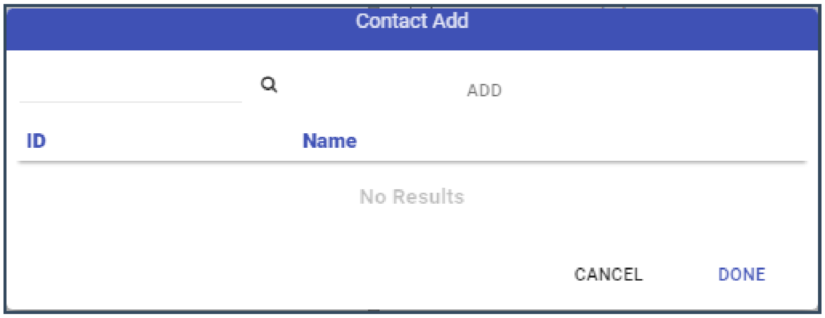
Global Keyholders are persons who are utilized on multiple accounts and reference a single Global Keyholder record for their details.



1. Within the Add **Global Keyholder** dialog, enter or **search for the Global Keyholder** you wish to add.
2. Once loaded Click **Add**.
3. Once Added Click **Done**.
4. **Repeat** as required for all applicable Global Keyholders.

Customer

You may add other **Customers** that have a relationship with this Customer as well.



1. Select **Customer**
2. Within the **Customer** Add dialog enter or **search for the Customer** to Add.
3. Once loaded click **Add**.
4. Once Added Click **Done**.
5. **Repeat** as required for all Customer to link to this customer.

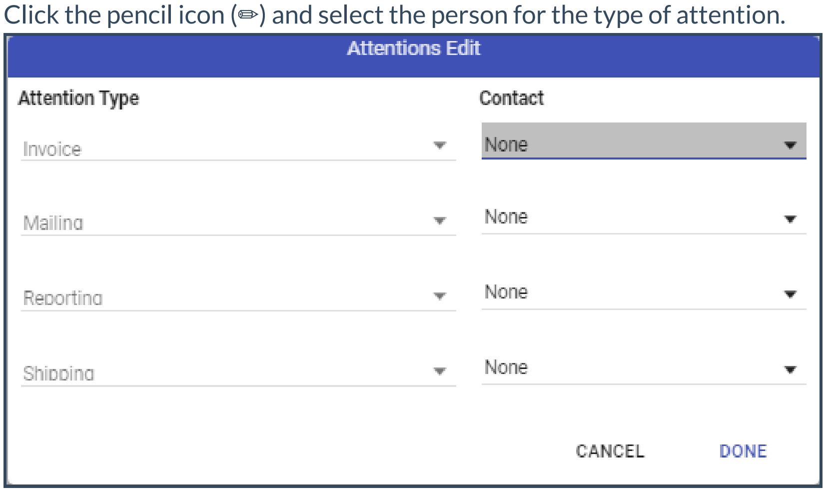
Once all contacts are entered as desired, **Save** (?) the record.

Attention Card

The Attention card is used only when printed items require attention to a specific person.

Adding an Attention

Click the pencil icon (✏) and select the person for the type of attention.



When entered as desired, click **Done**.

Remember to click **Save** (?) to commit the information to the database.

Contact Details Card

The Contact Details card populates with the data entered for that contact upon selection of their contact within the Contacts Card.

You may click the pencil icon (✏) **to edit the contact at any time**. This launches the Advanced Edit dialog for that contact as above.