

Adding Contacts

Contacts are specific users you can add to a client beyond the primary contact. They can be configured with [Client Portal](#) access, permissions and roles. Contact's email address are also used to automatically associate tickets with client accounts.

Access the Add New Contact Page

1. [Access the Client Profile page.](#)
2. In the [Authorized Contacts](#) section, click **add contact**.

The *Add New Contact* page appears.

Complete the Contact Details Tab

1. In the **Name** field, enter the contact's name.
2. In the **Email** field, enter the contact's email.
3. In the **Title** field, enter the contact's business title.
4. In the **Phone** field, enter the contact's phone number.
5. In the **Language** field, select the contact's preferred language.
6. Select the **Audit Account** field if you want this contact to receive a copy of all emails received by any other contact.
7. In the **RWhois Roles** field select one or more roles to establish the associated RWhois role. Select **POC** to establish this contact as the point of contact, select **Tech** as the technical contact, and **Abuse** as the abuse contact.
8. In the **Avatar** field, select either **Gravatar** or **Custom Avatar**. If you selected **Custom Avatar** the **Choose File** field enables. Click **Choose File**, navigate to the location of your avatar file, and click **Open**. A 50 x 50 pixel GIF, JPG, or PNG file can be uploaded and used. In order to enable the **Avatar** field, you must select **Admin & Client Interface** in the *Avatar Settings* section on the *Support General Settings* page. To display client avatars using Gravatar, your client needs to upload a file to gravatar.com, which Ubersmith will pull from.

Complete the Login & Password Tab

1. Click the *Login & Password* tab.
2. Select the **Enable Login** field, if you want to allow the contact to log into the *Client Portal*.
3. In the **Login** field, enter the contact's user name.
4. In the **Password** field, enter the contact's password, or click auto generate to have the password generated by Ubersmith.

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5. In the **Confirm Password** field, enter the same password. This field automatically populates if you selected auto generate.

The screenshot shows the 'Add New Contact' form in the Ubersmith application. The 'Login & Password' tab is selected and highlighted with a red circle. The form includes a 'Password Requirements' section with the following rules:

- Password must not be the same as the username
- Password must be at least 7 characters
- Password must contain both alphabetic and numeric characters
- Password cannot be one of the best 4 passwords used

Below the requirements, there is a 'Trouble Login?' checkbox, a 'Login' field with the value 'jason', a 'Password' field with a masked value, and a 'Confirm Password' field with a masked value. A 'Auto generate' link is next to the password field. At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons.

Complete the Roles Tab

1. Click the *Roles* tab.
2. Select one or more roles to assign to the contact. See [Adding Contact Roles](#) for more information.

The screenshot shows the 'Add New Contact' form in the Ubersmith application. The 'Roles' tab is selected and highlighted with a red circle. The form displays a list of roles with checkboxes:

- Contact Admin ☐
- Receives Invoice ☐
- Accounts Receivable ☒

At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons.

Complete the Custom Fields Tab

1. Click the *Custom Fields* tab.
2. If you have any custom client fields set up in your Ubersmith instance, they will display here. See [Adding Custom Contact Fields](#) to configure these options.
3. Click **Save** or **Save & New**.

The screenshot shows the 'Add New Contact' form in the Ubersmith application. The 'Custom Fields' tab is selected and highlighted with a red circle. The form displays a list of custom fields under the 'Ungrouped' section:

- None

At the bottom, there are 'Save', 'Save & New', 'Unlock', and 'Cancel' buttons. The 'Save' and 'Save & New' buttons are highlighted with a red circle.

Related Topics

[Managing Contacts](#)