

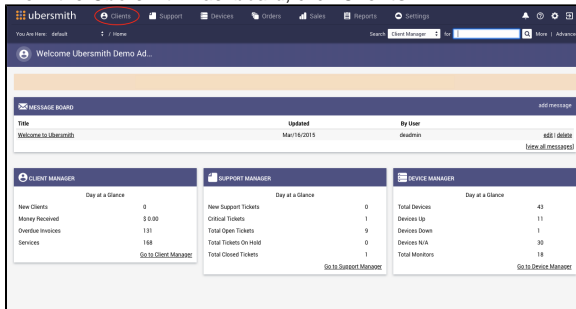
Managing Contacts

Once you have [created a contact](#), you can perform various actions on it.

Access the View Contact Page

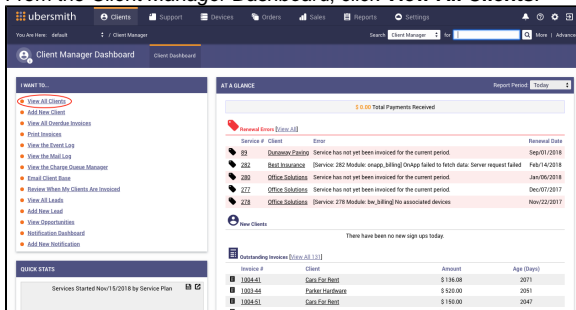
There are several ways to access contact information to manage it, but the *View Contact* page provides the most configurable information in one place.

1. From the *Ubersmith Dashboard*, click **Clients**.



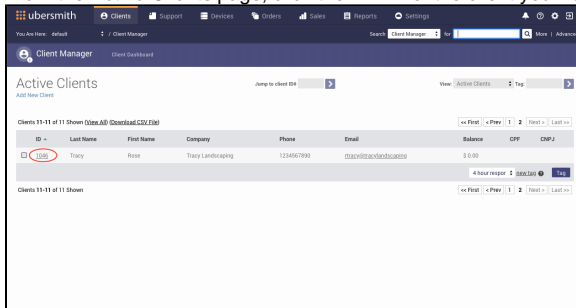
The *Client Manager Dashboard* appears.

2. From the *Client Manager Dashboard*, click **View All Clients**.



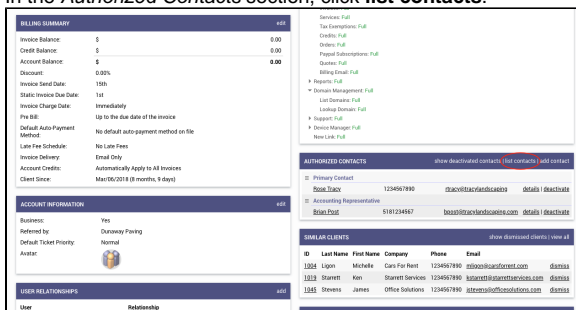
The *Active Clients* page appears.

3. From the *Active Clients* page, click the ID link of the client you want to view contacts for.



The *Client Profile* page appears.

4. In the *Authorized Contacts* section, click **list contacts**.



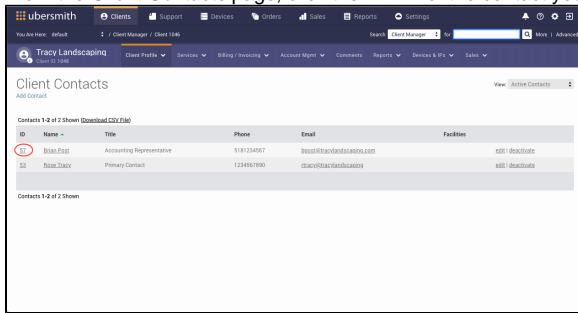
The *Client Contacts* page appears.

On this page:

On this page:

- [Access the View Contact Page](#)
- [Deactivating Contacts](#)
- [Reactivating Contacts](#)
- [Editing Contact information](#)
- [Editing Account Information](#)
- [Editing Login Information](#)
- [Editing Contact Roles](#)
- [Managing Permissions](#)
- [Managing Notification Subscriptions](#)
- [Adding Facility Access](#)
- [Managing Facility Access](#)
- [Revoking Facility Access](#)
- [Related Topics](#)

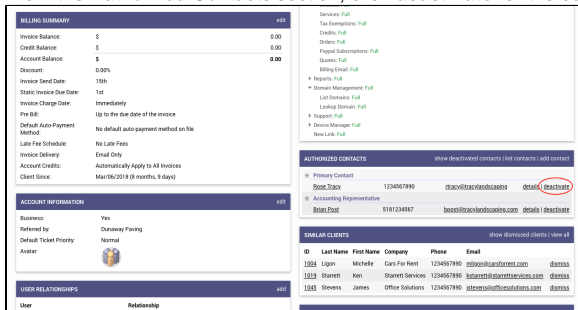
- From the *Client Contacts* page, click the **ID** link of the contact you want to view.



The *View Contact* page appears.

Deactivating Contacts

- Access the *Client Profile* page.
- From the *Authorized Contacts* section, click **deactivate** for the contact you want to deactivate.

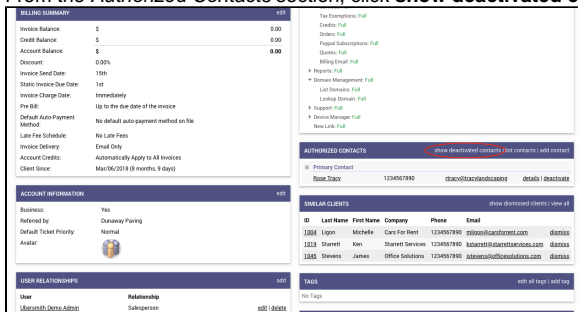


A confirmation message appears.

- Click **Yes**.

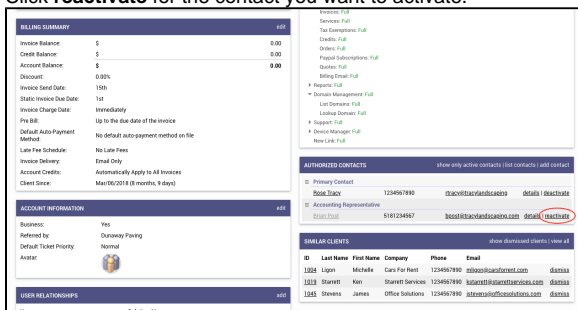
Reactivating Contacts

- Access the *Client Profile* page.
- From the *Authorized Contacts* section, click **show deactivated contacts**.



Previously deactivated contact appear.

- Click **reactivate** for the contact you want to activate.

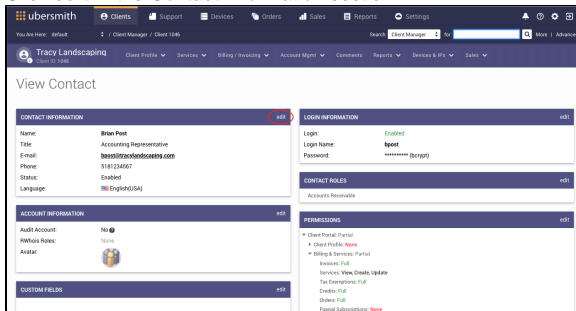


A confirmation message appears.

- Click **Yes**.

Editing Contact information

1. Access the [View Contact page](#).
2. Click **edit** in the **Contact Information** section.



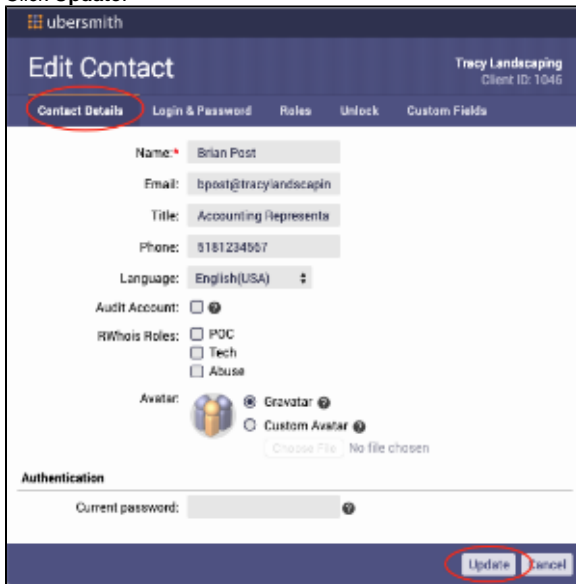
The *Edit Contact* page appears.

3. Make any necessary updates.

Note

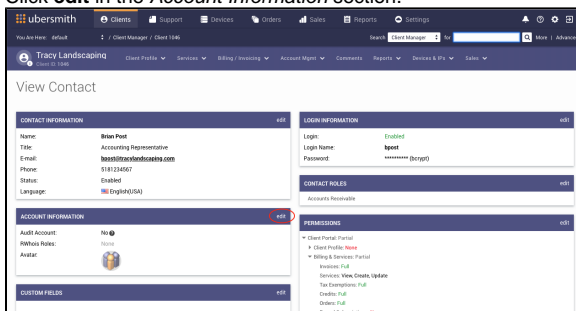
If you need to change a client contact's email address, you must first provide **your** current password

4. Click **Update**.




Editing Account Information

1. Access the [View Contact page](#).
2. Click **edit** in the **Account Information** section.



The *Edit Contact* page appears.

3. Make any necessary updates.

-
- ubersmith
- ## Edit Contact
- Tracy Landscaping
Client ID: 1046
- Contact Details** | Login & Password | Roles | Unlock | Custom Fields
- Name: Brian Post
- Email: bpost@tracylandscaping
- Title: Accounting Representative
- Phone: 5181224987
- Language: English(USA) ▼
- Audit Account: ☐ ⓘ
- R/Wholes Rules: ☐ POC ☐ Tech ☐ Abuse
- Avatar:  ☒ Growator ⓘ ☐ Custom Avatar ⓘ
- [Choose File](#) No file chosen
- Update** **Cancel**

Editing Login Information

1. Access the [View Contact](#) page.
2. Click **edit** in the *Login Information* section.

The screenshot displays the 'Tracy Landscaping' user profile in the ubersmith CRM. The top navigation bar includes tabs for Clients, Support, Devices, Orders, Sales, Reports, and Settings. The breadcrumb trail shows 'You're here: default > Client Manager > Client 1846'. The profile page is divided into several sections: 'CONTACT INFORMATION' (Name: Brian Post, Title: Accounting Representative, Email: bpost@tracylandscaping.com, Phone: 518-213-6867, Status: Enabled, Language: English(US)), 'LOGIN INFORMATION' (Login: Enabled, Login Name: bpost, Password: ***** (logoff)), 'ACCOUNT INFORMATION' (Referrer: None, Avatar: [Profile Picture]), and 'CUSTOM FIELDS' (empty). The 'CONTACT ROLES' section lists 'Account Responsible'. The 'PERMISSIONS' section lists various roles with their status: Client Portal (Partial), Client Profile (None), Billing & Services (Partial), Invoices (Full), Services View, Credits Update, Tax Exemptions (Full), Orders Full, Orders Full, and Order & Reservation (None). The 'LOGIN INFORMATION' tab is highlighted with a red box.

- The *Edit Contact* page appears.
- Make any necessary updates.
- Click **Update**.

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Edit Contact

Tracy Landscaping
Client ID: 1040

[Contact Details](#)
[Login & Password](#)
[Roles](#)
[Unlock](#)
[Custom Fields](#)

Name:

Email:

Title:

Phone:

Language:

Audit Account: ☐

RWhois Rules: ☐ POC ☐ Tech ☐ Abuse

Avatar:
☒ Greater ☐ Custom Avatar

Choose File No file chosen

[Update](#)
[Cancel](#)

Editing Contact Roles

1. Access the View Contact page.

- Click **edit** in the *Contact Roles* section.

The *Edit Contact* page appears with the *Roles* tab active.

- Make any necessary updates.
- Click **Update**.

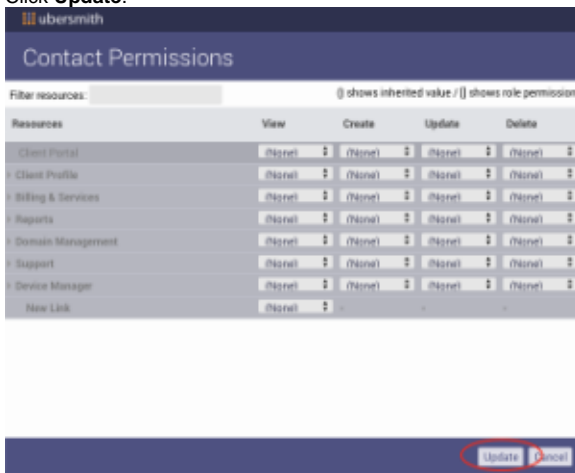
Managing Permissions

- Access the [View Contact](#) page.
- Click **edit** in the *Permissions* section.

The *Contact Permissions* page appears.

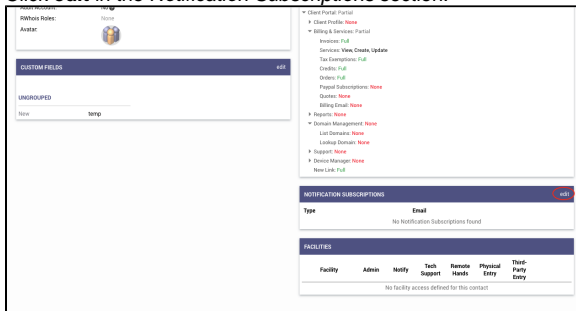
- Make any necessary updates. See [Client](#), [Contact](#), and [Leads Permission Details](#) for more information.

4. Click **Update**.



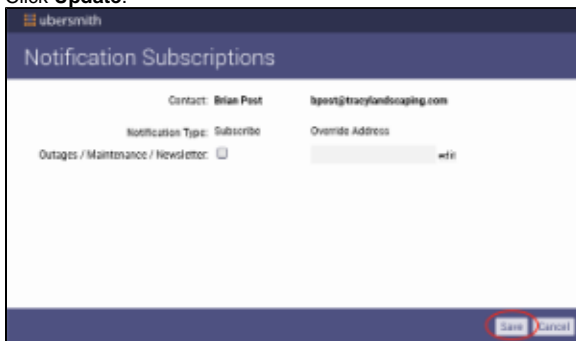
Managing Notification Subscriptions

1. Access the [View Contact](#) page.
2. Click **edit** in the *Notification Subscriptions* section.



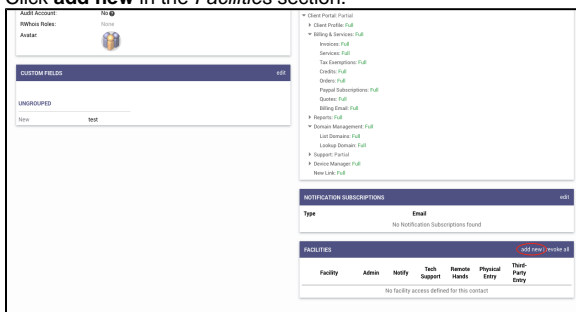
The *Notification Subscriptions* page appears.

3. Make any necessary updates.
4. Click **Update**.



Adding Facility Access

1. Access the [View Contact](#) page.
2. Click **add new** in the *Facilities* section.



The *Facility Access* page appears.

3. In the **Facility** field, select the desired facility you want to grant access to.
4. In the **remaining** fields, select **Yes** if you want to grant the contact that specific access level.
5. Click the **Notes** tab and enter any notes about the facility access for the contact.
6. Click **Save**.

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Facility Access

Details Notes

Contact: Jane Best

Facility*: ATL: Atlanta Datacenter

Admin: Yes

Notify: Yes

Tech Support: No

Remote Hands: No

Physical Entry: No

Third-Party Entry: No

Save Cancel

Managing Facility Access

1. Access the [View Contact page](#).
2. Click **edit** in the **Facilities** section for the facility access you want to edit.

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View Contact

Details Notes

Contact: Jane Best

Facility*: ATL: Atlanta Datacenter

Admin: Yes

Notify: Yes

Tech Support: No

Remote Hands: No

Physical Entry: No

Third-Party Entry: No

Save Cancel

The **Facility Access** page appears.

3. Make any necessary updates.
4. Click **Save**.

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Facility Access

Details Notes

Contact: Jane Best

Facility*: ATL: Atlanta Datacenter

Admin: Yes

Notify: Yes

Tech Support: No

Remote Hands: No

Physical Entry: No

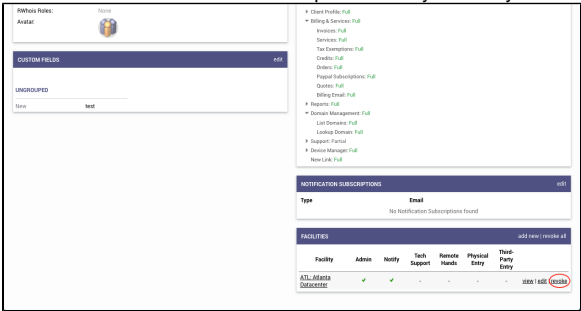
Third-Party Entry: No

Save Cancel

Revoking Facility Access

1. Access the [View Contact page](#).

2. Click **revoke all** or **revoke** for the specific facility access you want to remove.



- A confirmation message appears.
3. Click **Yes**.

Related Topics

[Adding Contacts](#)