

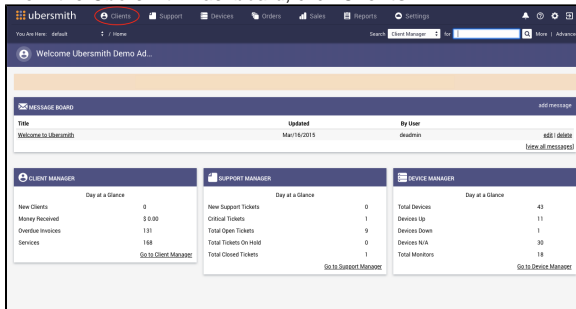
Managing Contacts

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

Access the View Contact Page

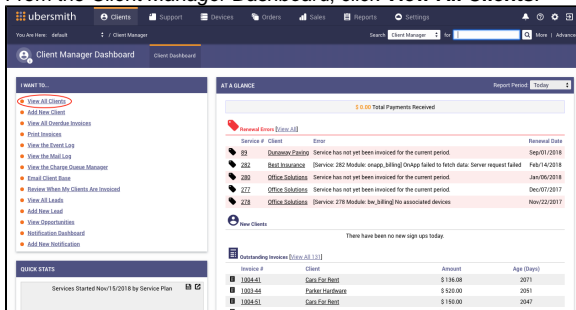
There are several ways to access contact information to manage it, but the *View Contact* page provides the most configurable information in one place.

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



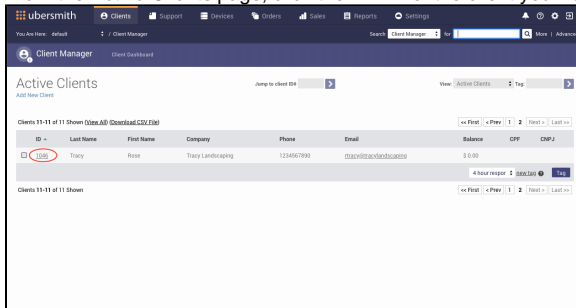
The *Client Manager Dashboard* appears.

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



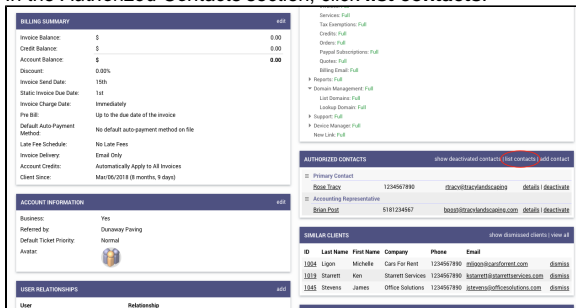
The *Active Clients* page appears.

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**.



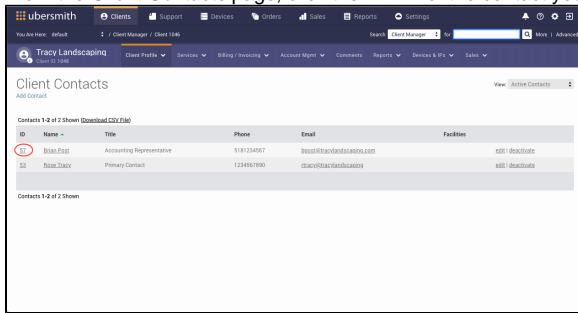
The *Client Contacts* page appears.

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](#)

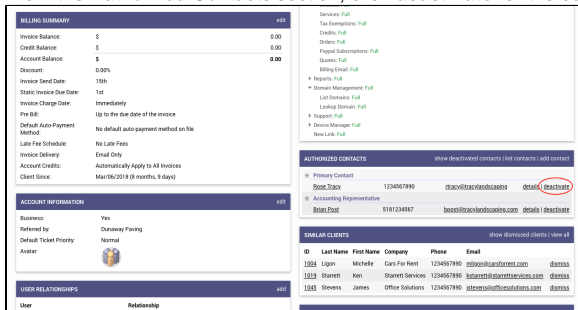
- From the *Client Contacts* page, click the **ID** link of the contact you want to view.



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.

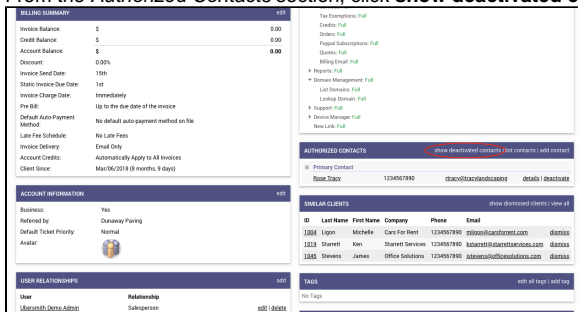


A confirmation message appears.

- Click **Yes**.

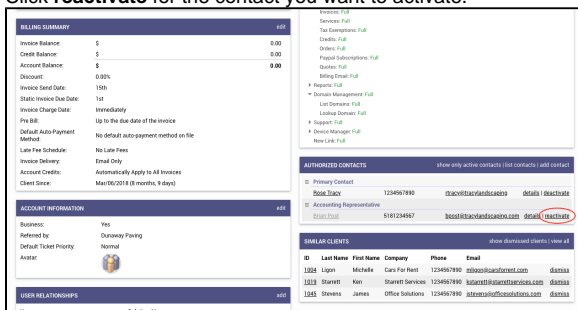
Reactivating Contacts

- 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.

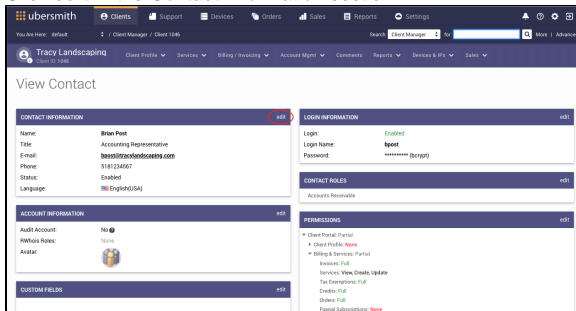


A confirmation message appears.

- Click **Yes**.

Editing Contact information

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



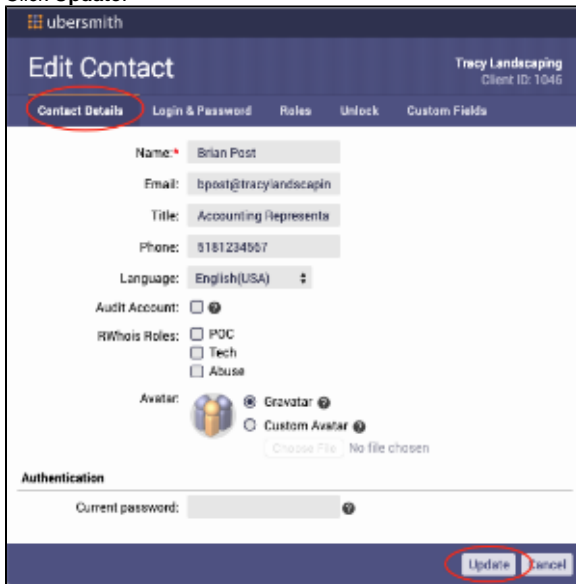
The *Edit Contact* page appears.

3. Make any necessary updates.

Note

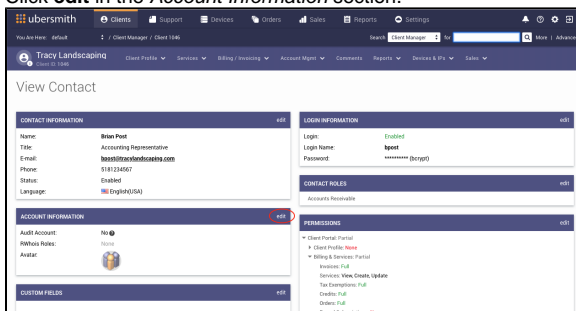
If you need to change a client contact's email address, you must first provide **your** current password

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
Guest ID: 1046
- Contact Details** | Login & Password | Roles | Unlock | Custom Fields
- Name: Brian Post
- Email: bpost@tracylandscaping.com
- Title: Accounting Representative
- Phone: 5181224567
- Language: English(USA) ▼
- Audit Account: ☐ ⓘ
- R/Wholes Rules: ☐ POC, ☐ Tech, ☐ Abuse
- Avatar:  ☒ Growater ⓘ, ☐ 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 shows the Tracy Landscaping website with a user logged in. The top navigation bar features the company logo, navigation links, and a user profile dropdown. The main content area displays the user's profile information, including name, email, phone, and status. The right sidebar contains a list of links for account management, billing, and reporting.

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

ubersmith

Edit Contact

Tracy Landscaping
Client ID: 1046

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

Name:

Email:


Title:

Phone:

Language:

Audit Account: ☐

RBAC Roles: ☐ POC ☐ Tech ☐ Abuse

Avatar:  ☒ ☐ 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**.

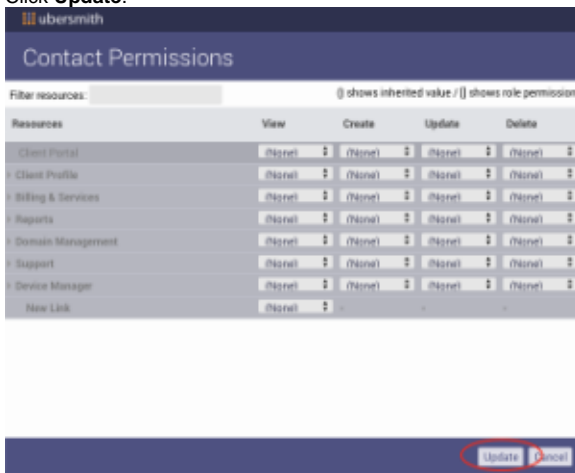
Managing Permissions

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

The *Contact Permissions* page appears.

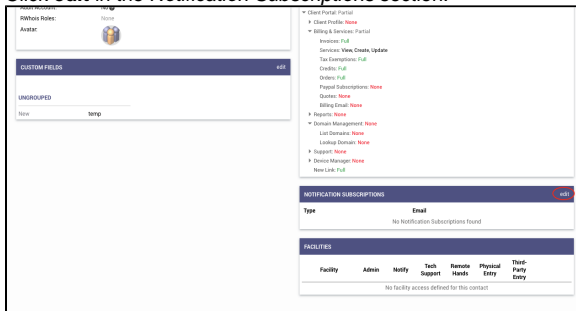
- Make any necessary updates. See [Client](#), [Contact](#), and [Leads Permission Details](#) for more information.

4. Click **Update**.



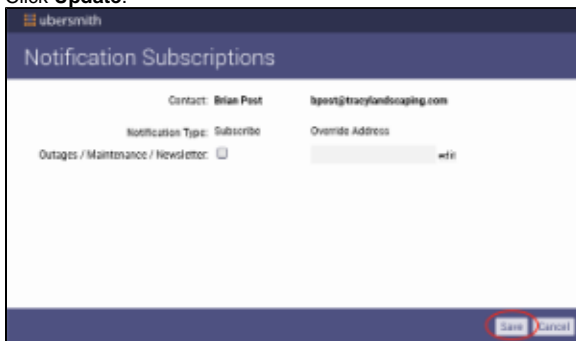
Managing Notification Subscriptions

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



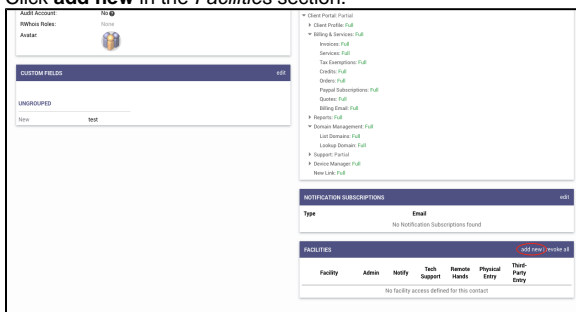
The *Notification Subscriptions* page appears.

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.

Network Roles

Avatar

CUSTOM FIELDS

UNGROUPED

None

• Client Profile Full

• Billing & Services Full

• Insurance Full

• Services Full

• Tax Exemptions Full

• Chiropractic Full

• Orders Full

• Patient Subscriptions Full

• Quotes Full

• Billing Email Full

• Payments Full

• Domain Management Full

• User Domains Full

• Looking Domain Full

• Support Portal

• Domain Manager Full

• New Link Full

NOTIFICATION SUBSCRIPTIONS

TypeEmail

No Notification Subscriptions Found

FACILITIES

add new / remove all

Facility	Admin	Notify	Tech Support	Remote Health	Physical Entry	Third Party Entry
ACT Atlanta Datacenter	✓	✓	-	-	-	VIEW INFO REVOKE

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

Related Topics

[Adding Contacts](#)