

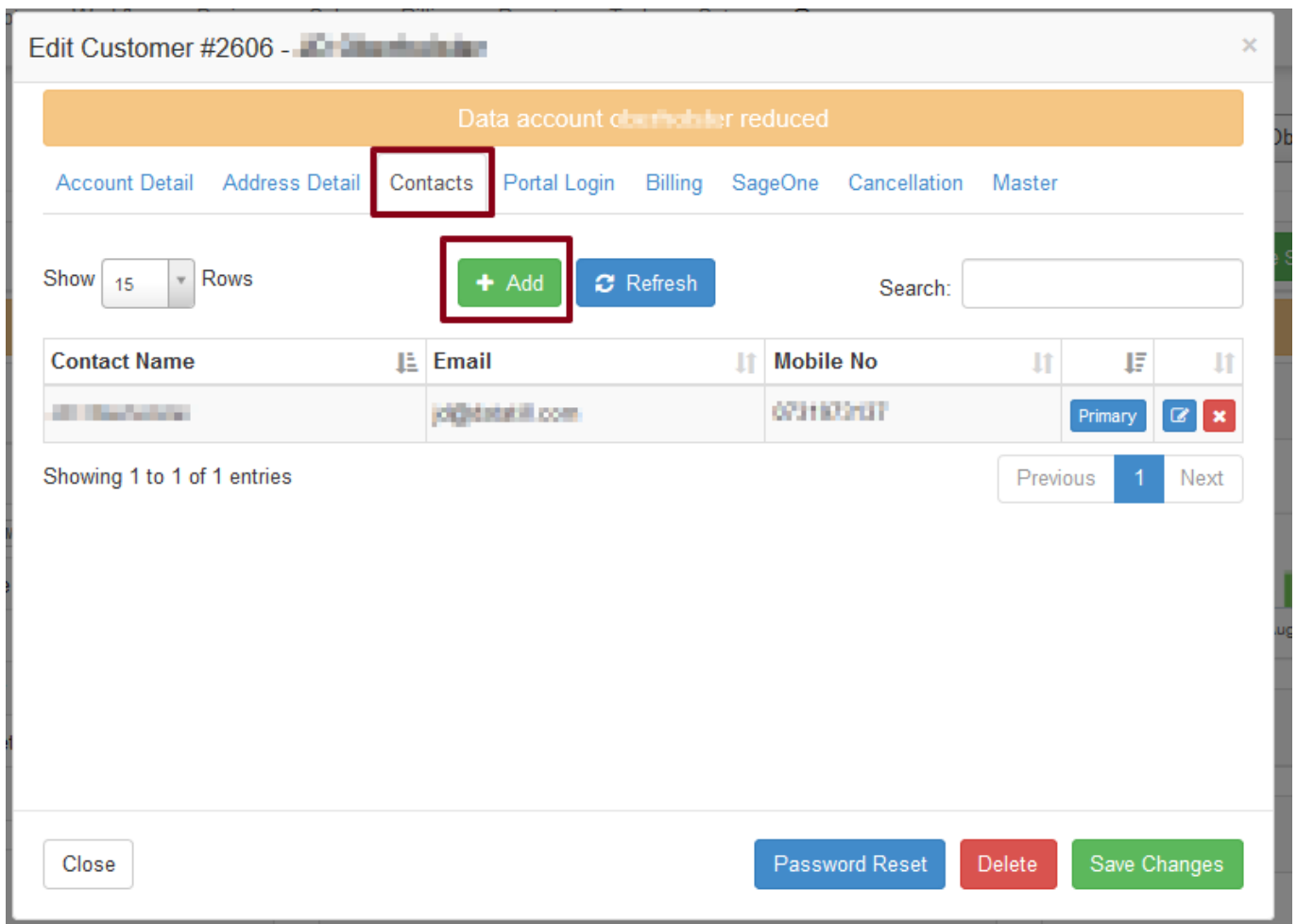
Additional customer contacts

Customers have the option to list additional contacts on their profiles. This is especially useful for security purposes and ensuring that the person requesting changes is actually linked to the profile. You will be able to add, change and remove additional contact details from the customer profile itself.

Adding a contact

To add additional contacts, go to the customer profile and click on the edit button in the accounts details section.

On the pop-up screen, go to the “**Contact**” section and then click on the “**Add**” button.



Edit Customer #2606 - [redacted]

Data account overview reduced

Account Detail Address Detail **Contacts** Portal Login Billing SageOne Cancellation Master

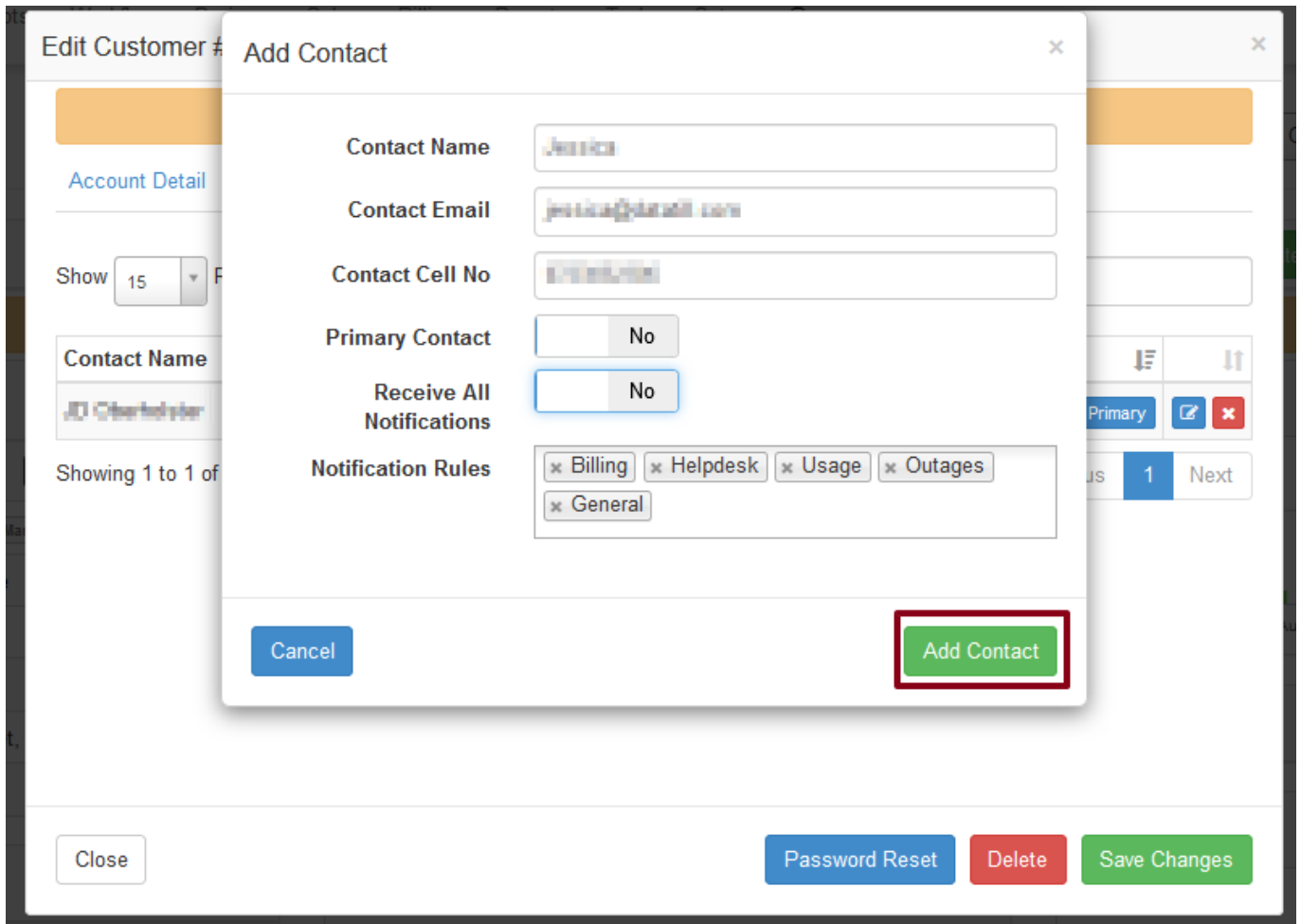
Show 15 Rows **+ Add** Refresh Search: [input]

Contact Name	Email	Mobile No		
[redacted]	[redacted]	[redacted]	Primary	[edit] [delete]

Showing 1 to 1 of 1 entries Previous 1 Next

Close Password Reset Delete Save Changes

Add all the contact details and click on the “**Add Contact**” button. Remember to press save when you are done adding the additional contact(s).



Please note that there can only be one Primary contact on a customer and the primary contact details are what will show on the “Account Detail” tab as well as on the Edit customer screen itself.

Notification rules explained:

<https://support.herotill.com/notification-rules-customer-contacts/>

Updating contact details

To update the customer contact details or the contact details of the additional contact, go back to the **contacts** screen and then click on the “**Edit**” button.

Edit Customer #22 - **Alice Liddel**

This is a Sub-Account of Wonderland (Pty) Ltd

[Account Detail](#) [Address Detail](#) **[Contacts](#)** [Portal Login](#) [Billing](#) [SageOne](#) [Cancellation](#)

Show

10

 Rows

+ Add

Refresh

Search:

Contact Name	Email	Mobile No		
Alice Liddel		0799999999	Primary	<div><div></div><div></div></div>

Showing 1 to 1 of 1 entries

Previous

1

Next

Close

Password Reset

Delete

Save Changes

On the pop-up screen, change the relevant details and then click on the **“Update Contact”** button.

Update Contact

×

Primary Contact

Contact Name

Alice Liddel

Contact Email

mail@mail.co.za

Contact Cell No

0799999999

Receive All Notifications

Yes

Cancel

Update Contact

You will see that the contact's details have changed. If this is not the case, click on the refresh button. If you are happy with the changes, click on the save button.

Determining who should receive specific notifications

If some of your additional contacts should only receive specific notifications, or there are notifications which they not receive, you can determine this by editing the contact and then changing the “**Receive All Notification**” section. Once you switch this button to “**No**”, you will be able to add or remove the notifications which this contact should or should not receive.

Update Contact



Primary Contact

Contact Name

Alice Liddel

Contact Email

mail@mail.co.za

Contact Cell No

0799999999

Receive All Notifications

No

Notification Rules

× Usage

× Billing

× Helpdesk

× Outages

× General

Cancel

Update Contact

For more information, you can refer to the section below

Notification rules explained:

<https://support.herotill.com/notification-rules-customer-contacts/>

Removing Contacts

To remove additional contacts, go to the “**Contacts**” tab and then click on the **red** button found the red box.

Edit Customer #22 - **Alice Liddel**

This is a Sub-Account of Wonderland (Pty) Ltd

[Account Detail](#) [Address Detail](#) **[Contacts](#)** [Portal Login](#) [Billing](#) [SageOne](#) [Cancellation](#)

Show Rows + Add Refresh Search:

Contact Name	Email	Mobile No		
Alice Liddel		0799999999	Primary	

Showing 1 to 1 of 1 entries Previous 1 Next

Close Password Reset Delete Save Changes

A message will pop-up with the following message: **“Are you sure you want to delete this contact? This cannot be undone.”** Once you are sure that you want to go through with this action, click on the **“OK”** button.

Are you sure you want to delete this contact?
This cannot be undone.

Cancel OK

Please note that you cannot delete primary contacts. If you would like to delete the primary contact, you will need to change the primary contact to one of your other contacts. Only

then will you be able to delete the contact.

