

Add Contacts and Adding/Assigning Access Template in Customer Control Panel

Summary

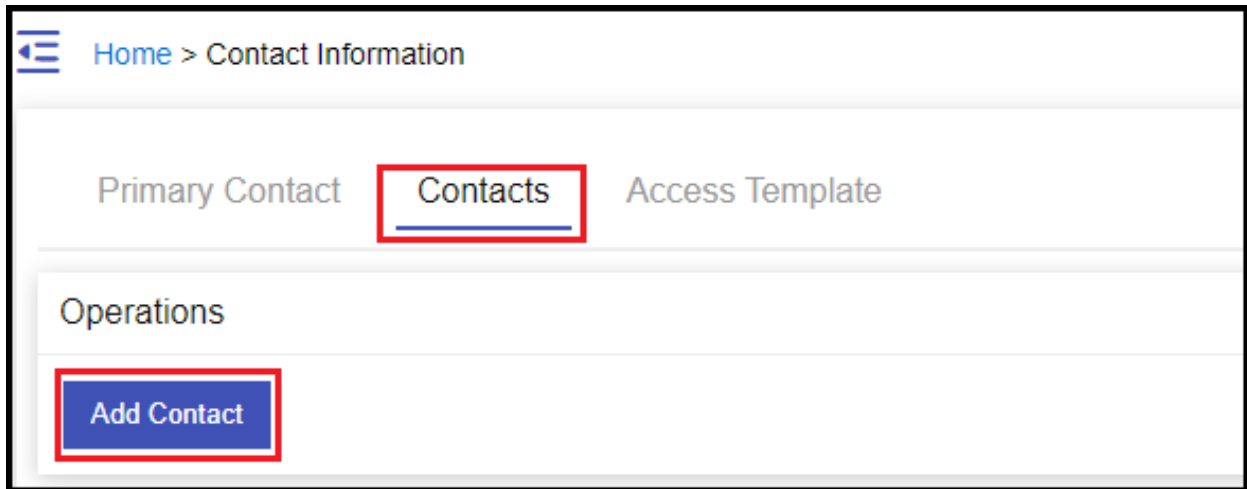
This article provides information on adding contacts in customer control panel.

Applies To

This article applies to all versions of MachPanel.

Edit Primary Contact, Add New Contact:

- Login to Customer Control Panel and navigate to following: **Home » Contact Information**
- Under **Primary Contact**, a customer can Edit his own information
- To Add New Contacts select **Contacts** tab, click on **Add Contact** button as shown below:



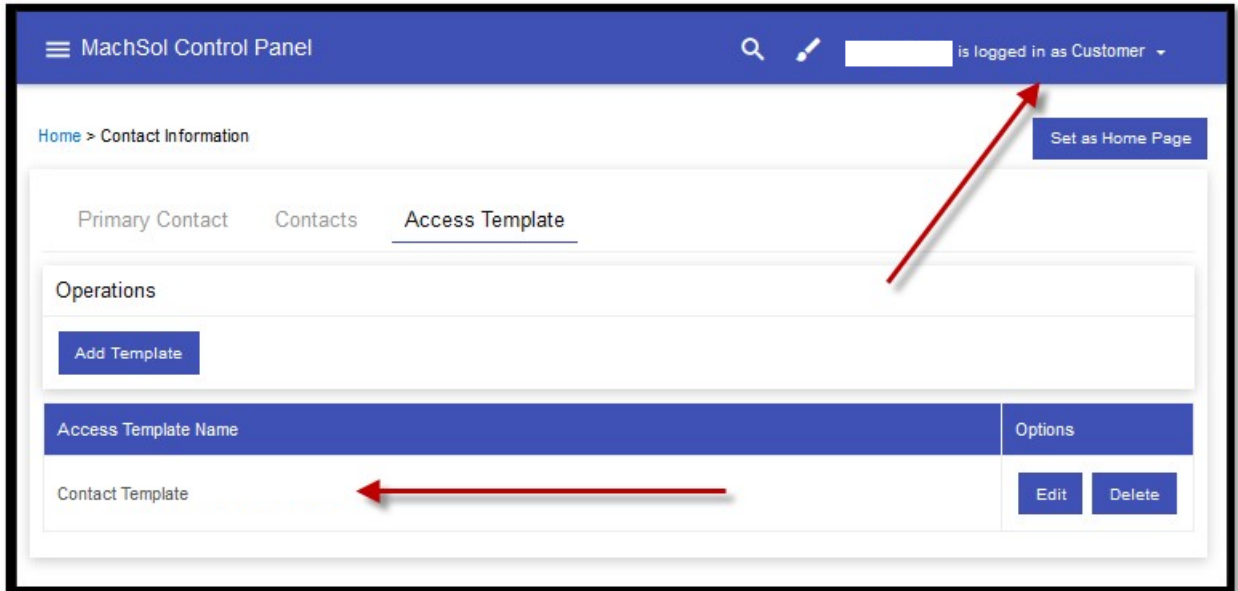
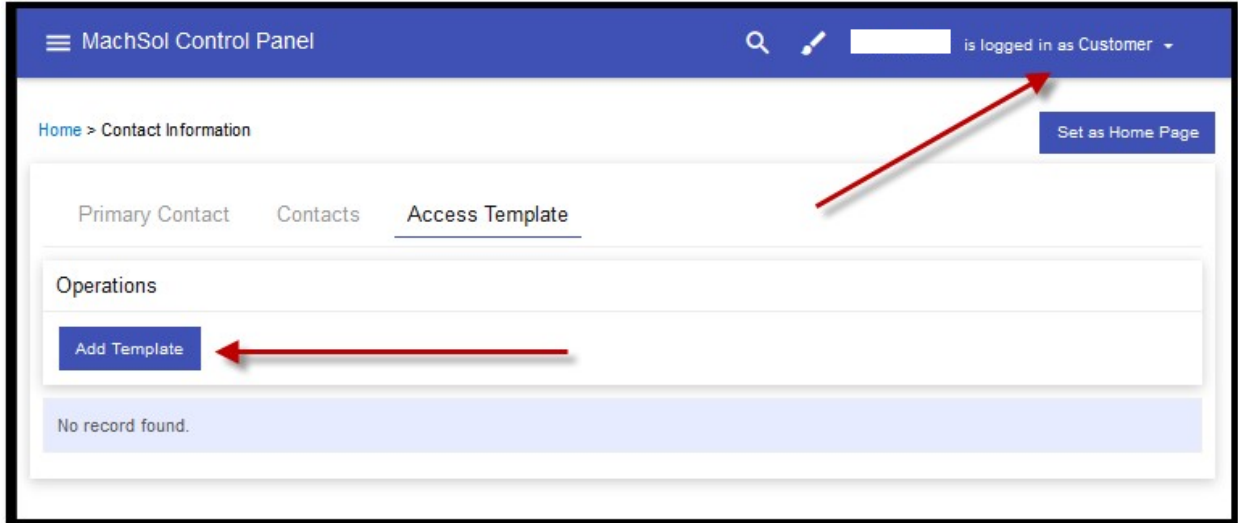
- If you want your contact to have access to control panel then select **Allow access to panel** and provide password as shown below:

A screenshot of the contact information form. The form contains several fields and options. The 'Email Address' field is filled with 'contact1@brrrok.com'. The 'Allow Access to Control Panel' checkbox is checked and highlighted with a red box. The 'Password' field is empty, and there is a 'Show Password' checkbox. The 'Confirm password' field is empty. The 'Authenticate via AD account' dropdown menu is set to 'No'. The 'Send email' checkbox is unchecked. The 'Access Template' dropdown menu is set to 'Contact Template Under Zohaib7025'. The 'Subscribe to Mailing list' checkbox is unchecked. At the bottom of the form, there are 'Save' and 'Cancel' buttons. A 'Generate Random' button is also present, with a note below it: 'Minimum length is 14 and must contain at least 1 upper case letter, 1 lower case letter, 1 number and 1 special character.'

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Access templates for Contacts:

You have to login as customer/reseller to be able to add access template for contacts



Once this is done, upon attempt to create contact you will be allowed to choose that access template created for contacts whether logged in as customer/reseller or provider:



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MachPanel Knowledgebase

<https://kb.machsol.com/Knowledgebase/54519/Add-Contacts-and-AddingAssigning...>