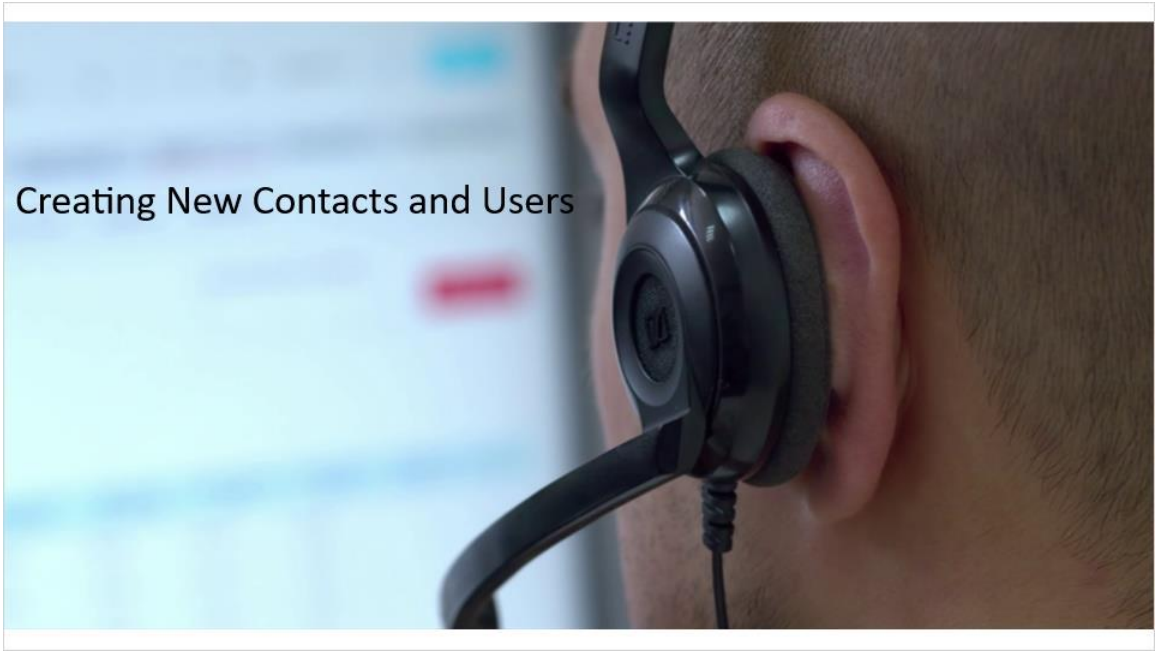
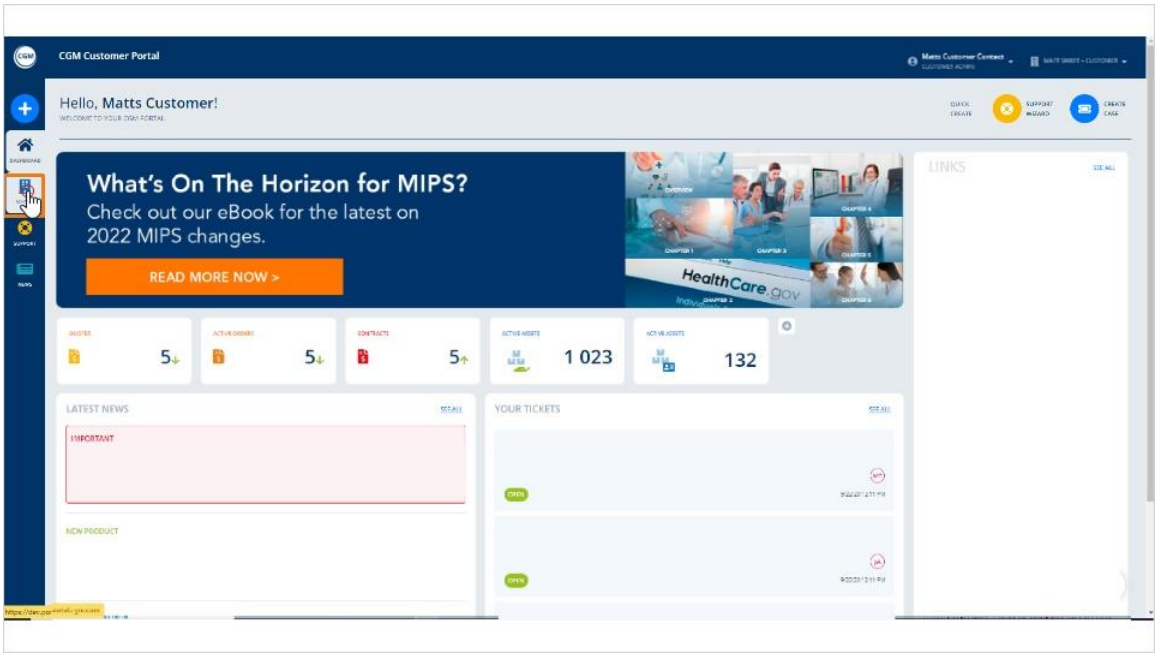
Creating New Contacts and Users

1.1 Creating New Contacts and Users



1.2 My Org



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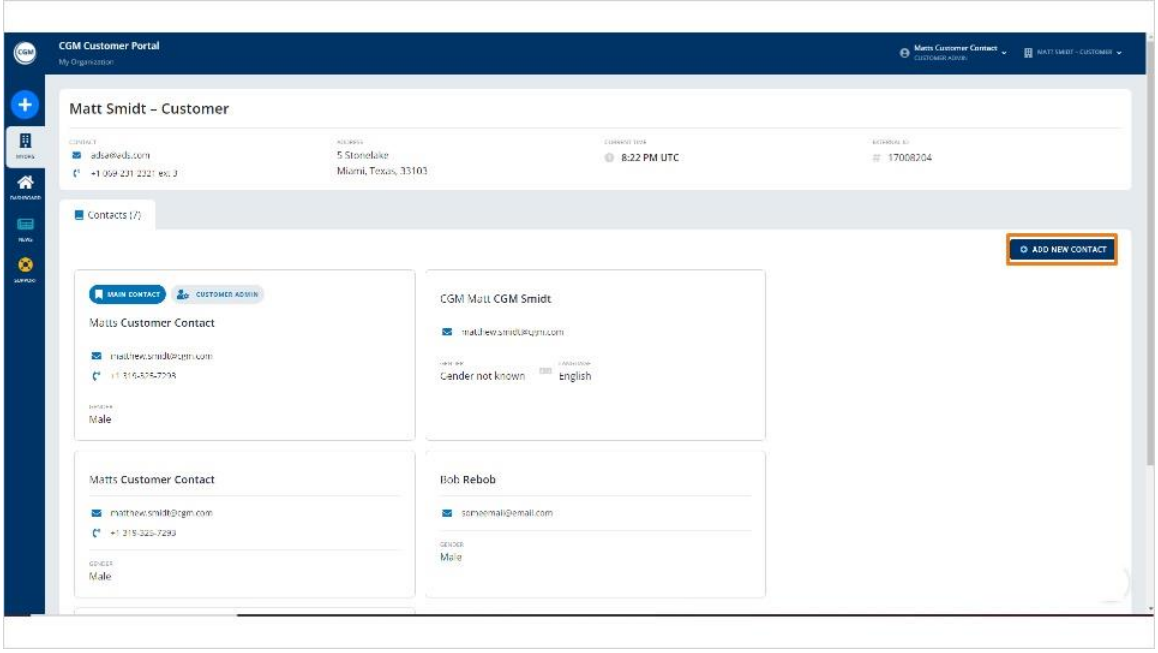
Notes:

When logged in as an admin for your organization, new contacts and users can be created for your organization. To view migrated users and create new users, go to the My Org tab in the navigation panel on the left side of the window.

1.3 View Linked Contacts

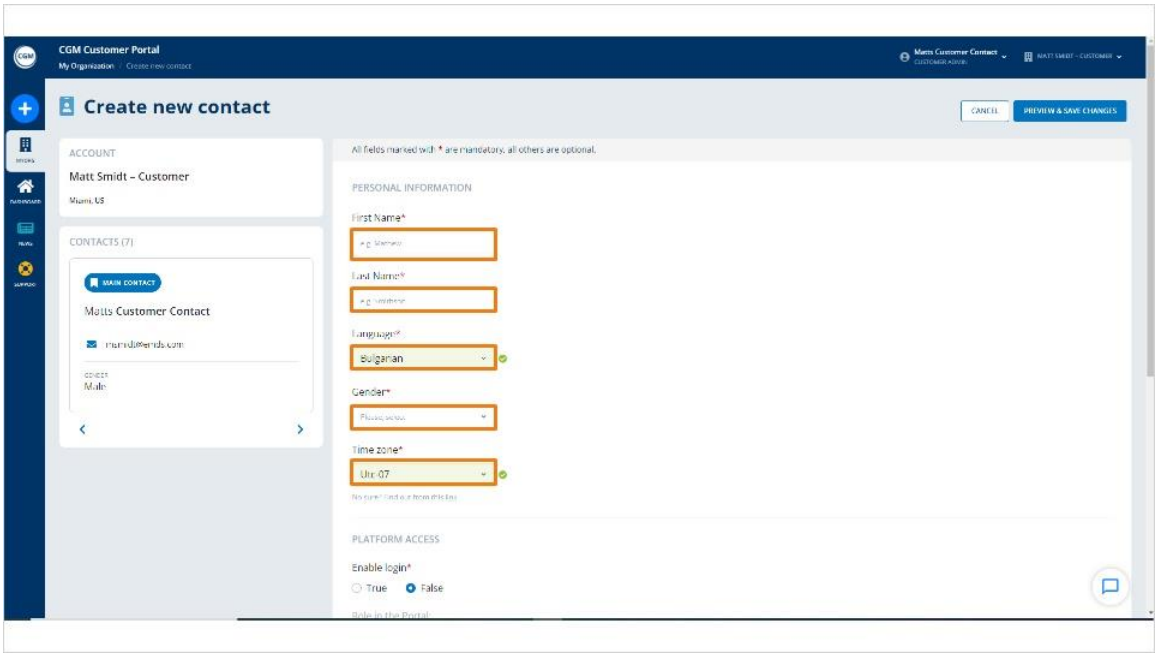


Notes:

Contacts for your facility designated as Customer Community Admin Users, Customer Community Users or Customer Community End Users in the previous support center migrated to the CGM Portal and can be viewed here.

If a support center user did not migrate or if there are new support center users needed, select the Add New User button on the right side of the window.

1.4 Personal Information



Notes:

Enter the first name, last name, preferred language, gender, and user time zone. All fields marked with a red asterisk are required fields.

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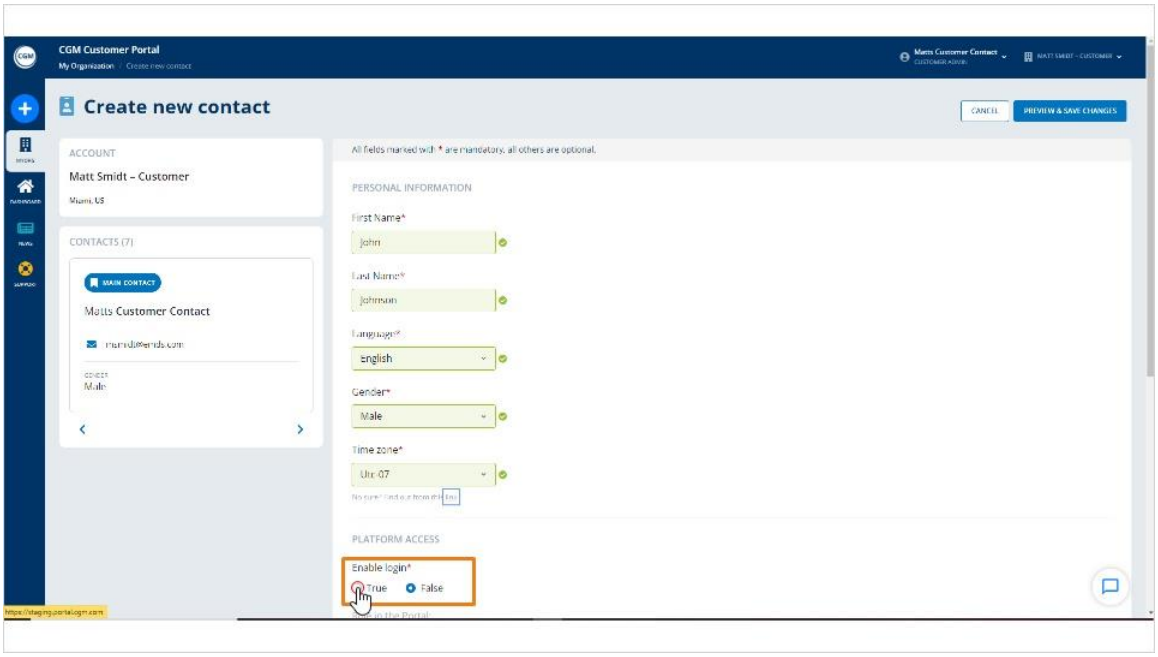
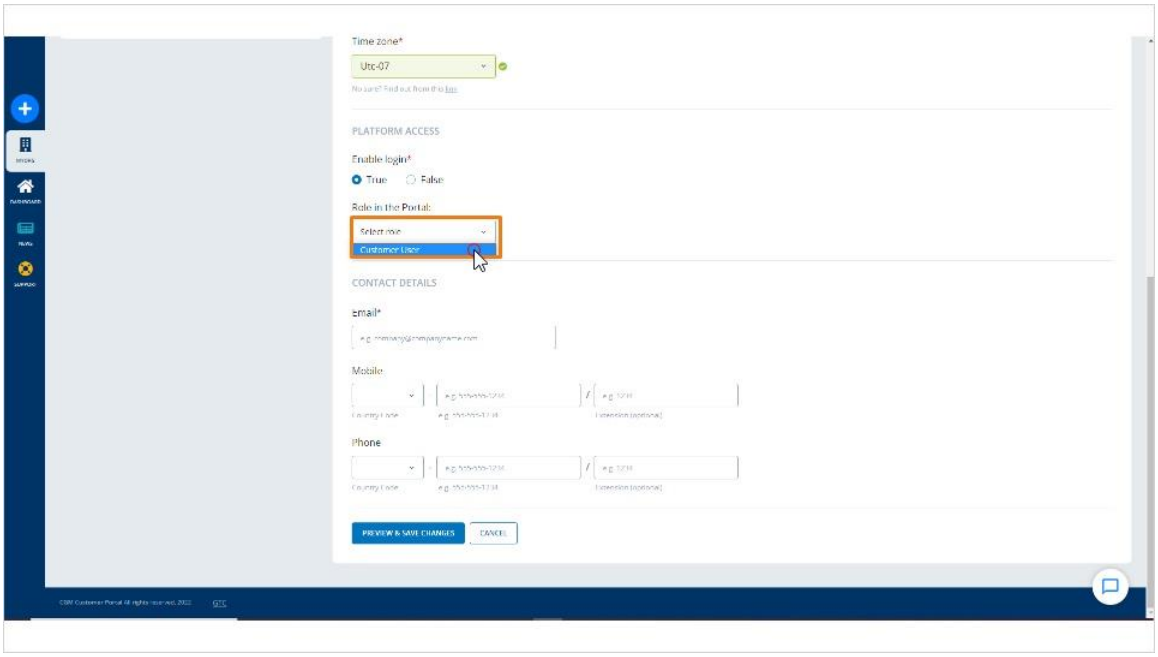
1.5 Enable Login



Notes:

If this user should receive an email inviting them to be a support center user, in the Enable Login field, select True.

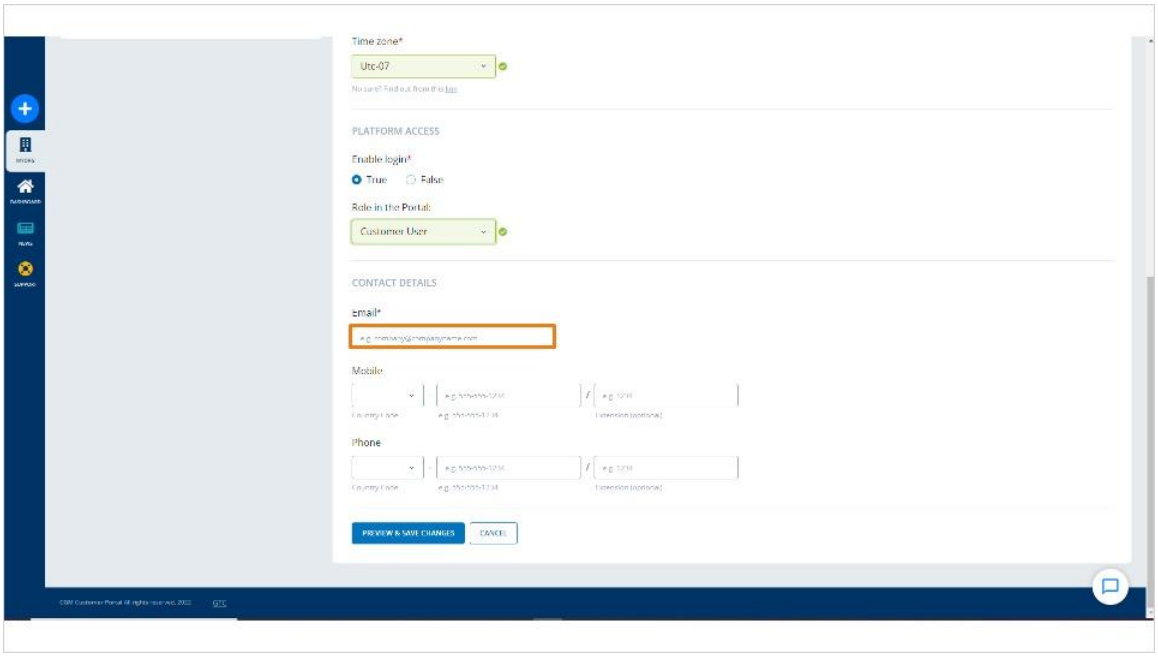
1.6 Role



Notes:

Select the role “Customer Use” from the list displayed In the Role in the Portal field,

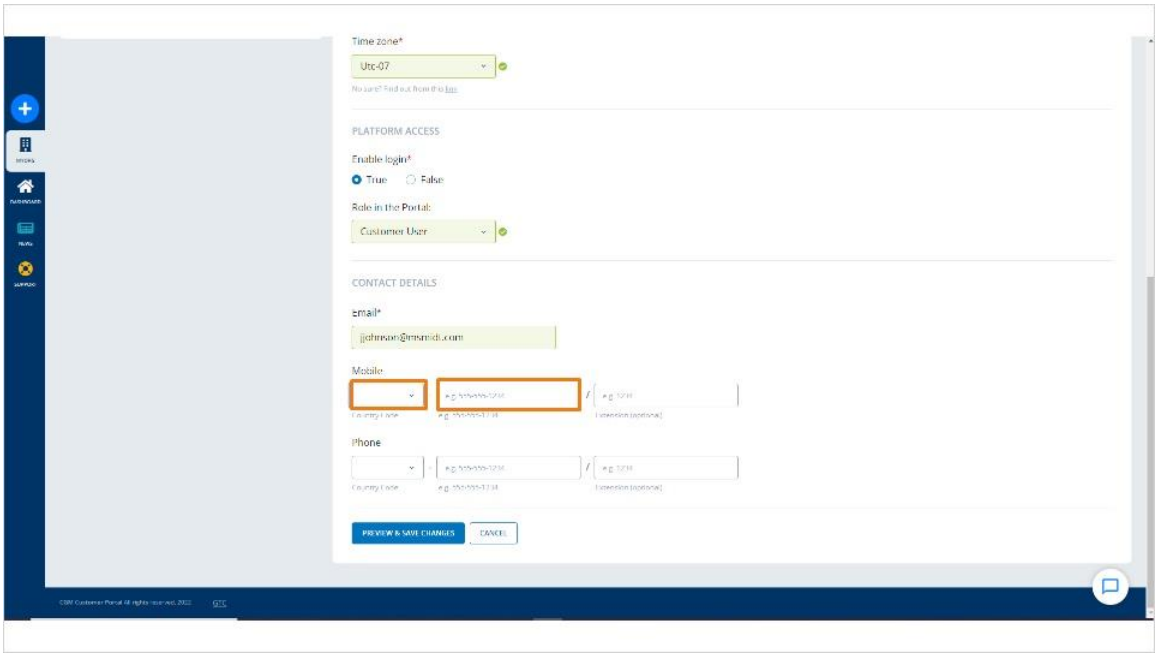
1.7 Email



Notes:

Enter the user's email address.

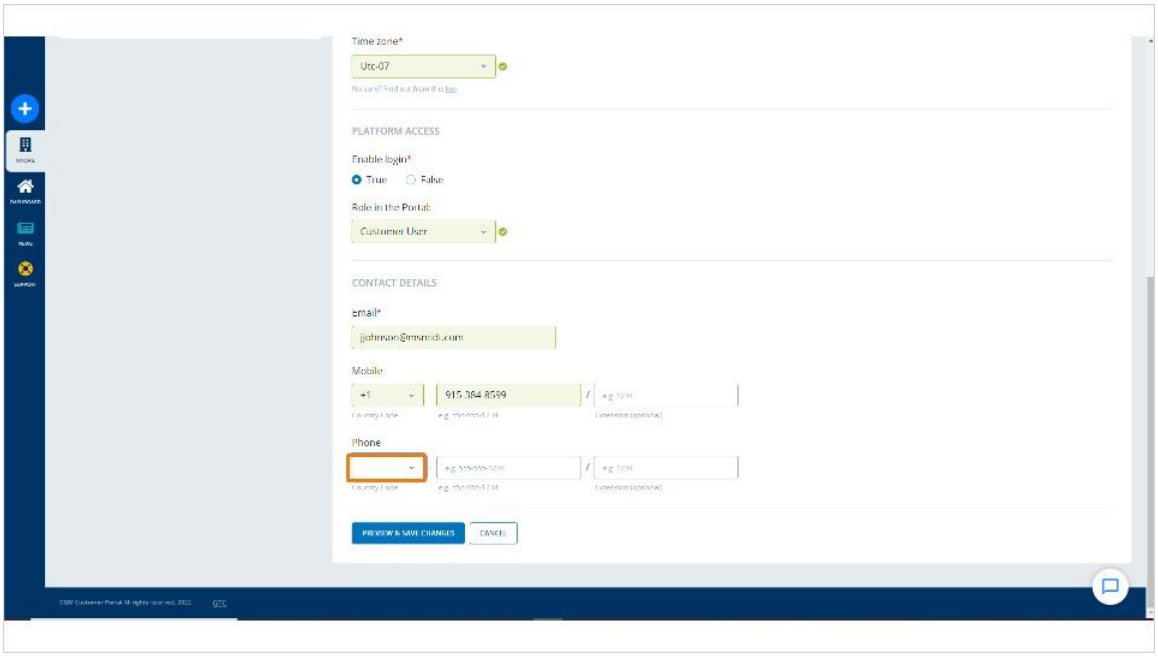
1.8 Mobile



Notes:

Enter the user's mobile phone number if available beginning with the Country Code. If the user is in the US, enter the number 1 and tab to enter the area code and 7 digit mobile number.

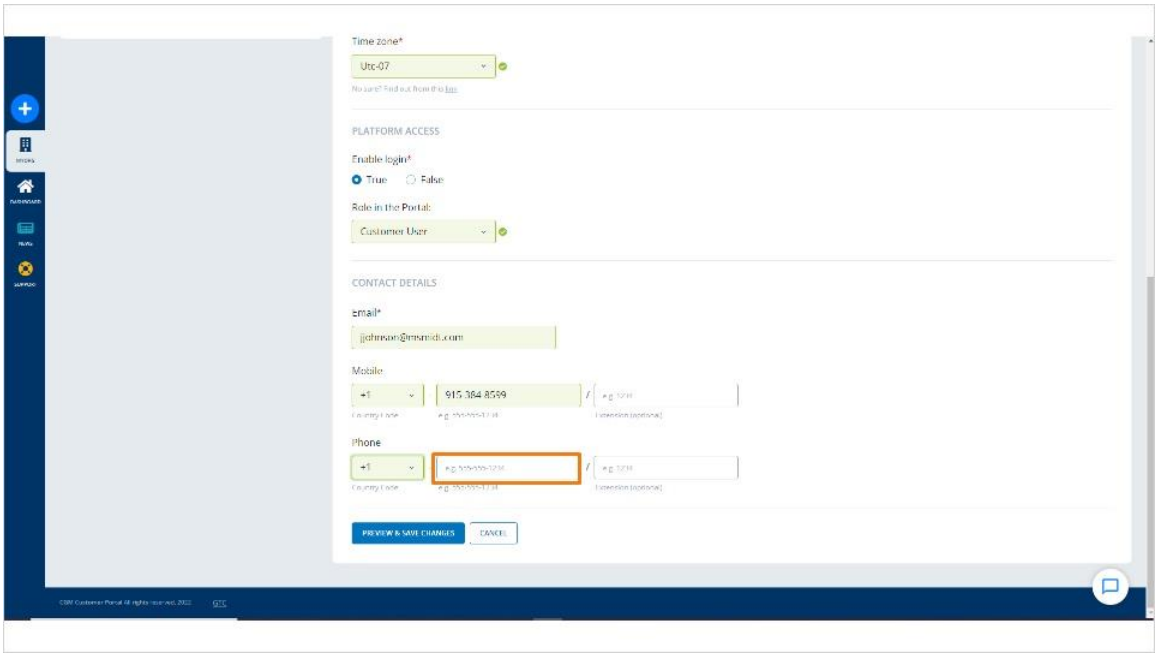
1.9 Country Code



Notes:

Next, enter the user's telephone number beginning with the Country Code.

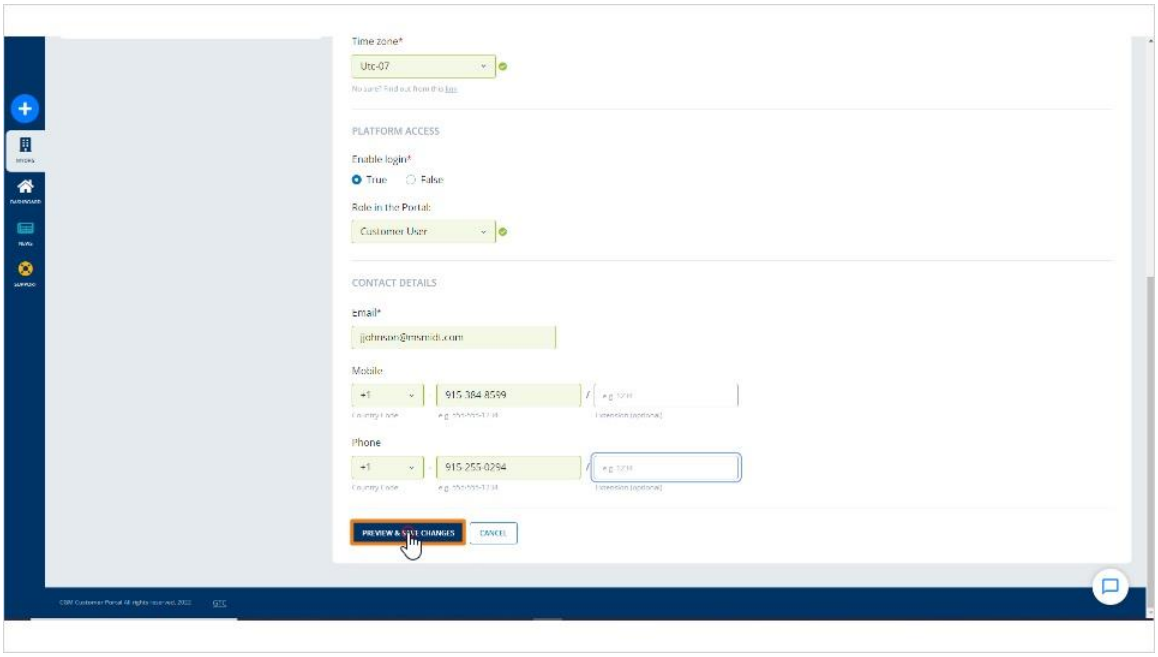
1.10 Telephone #



Notes:

Then tab to enter the area code and 7 digit telephone number.

1.11 Preview & Save Changes



Notes:

Select Preview & Save Changes.

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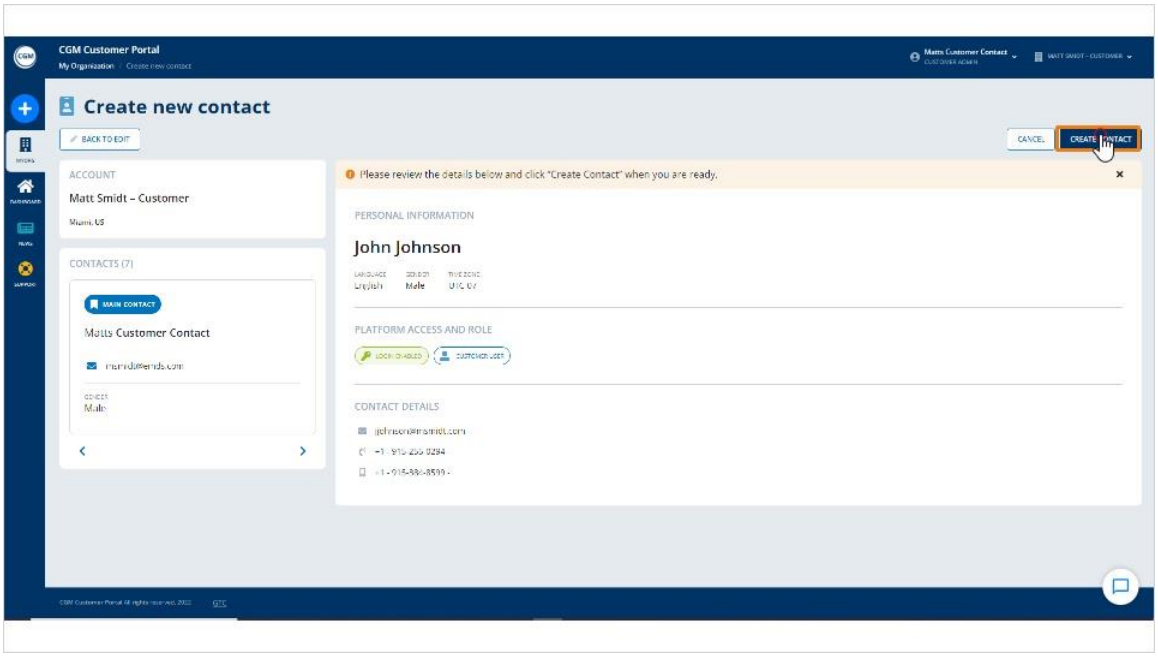
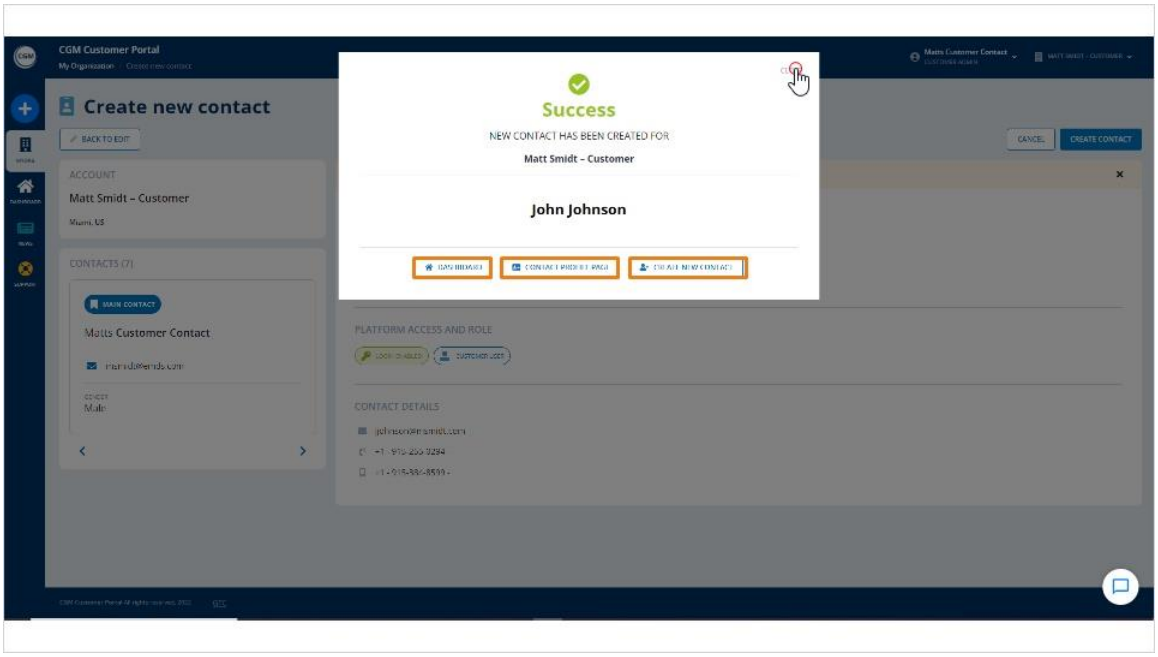
1.12 Create Contact



Notes:

If the information entered is correct, select Create Contact at the top right of the window.

1.13 Success



Notes:

When you see this message, your new contact has been successfully created. From here, you can use the buttons at the bottom of the window to go to the Dashboard, go to the Contact Profile Page or Create Another New Contact. To return to My Org, select the Close button!

1.14 More Resources

Notes:

We have created a library of short videos and documents to assist you in learning how to perform all of the tasks you need to do in the new CGM Support Portal. More content will be added as new features are made available so check back using the links in your Dashboard!

Click here to access more CGM Portal videos and documents!