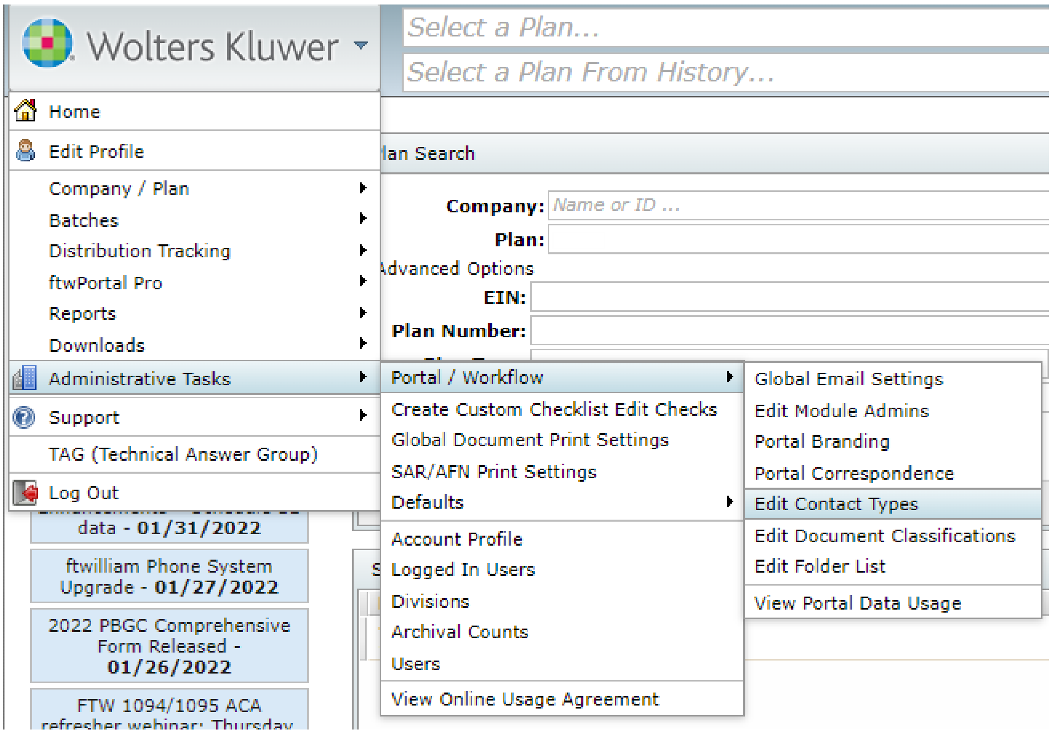
How to Add Contact Types with ftwPortal Pro

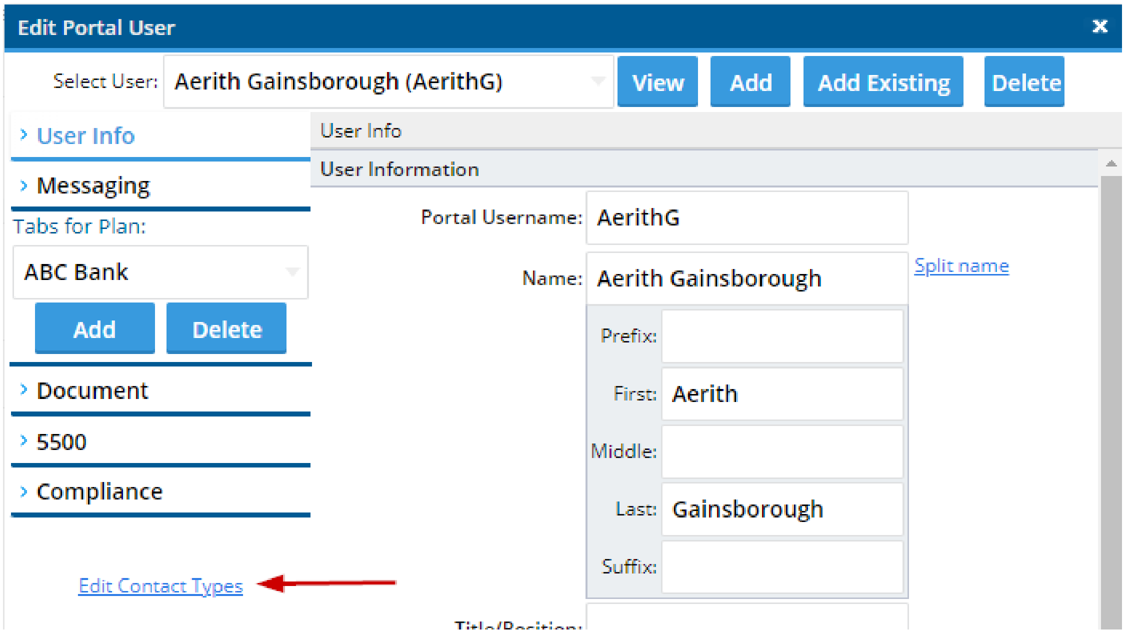
07/29/2024 2:19 pm CDT

To Edit/Add Contact Types, you do have to be the Master Admin User or a Designated Admin. The “Edit Contact Type” window may be accessed two different ways.

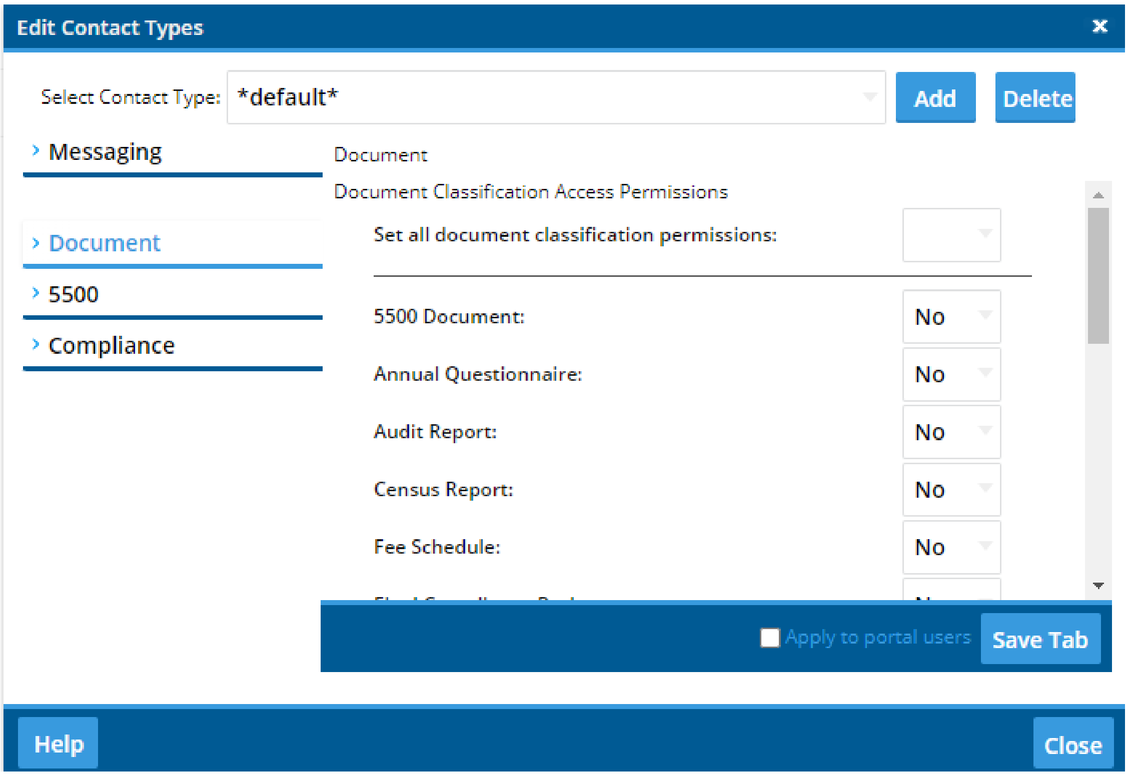
1. Select the Wolters Kluwer Logo>Administrative Tasks>Portal/Workflow>Edit Contact types:



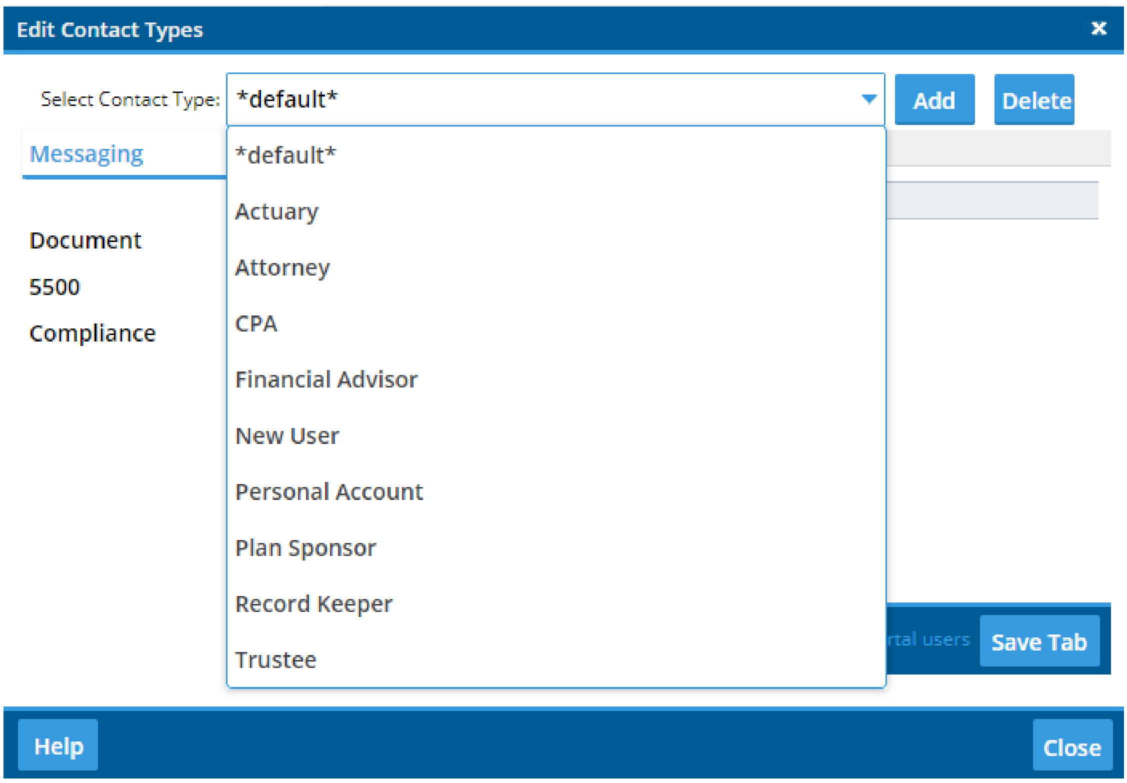
2. Select the link from within the ‘Edit Portal User’ Screen:



The “Edit Contact Types” link will open to the ‘*default*’ contact type. On the left-hand side of the screen, are the modules the account subscribes to. *For example, if the account does not have the Compliance software, the 'Compliance' tab will not populate.* The '*default*' permissions are those that each portal user is added with if a contact type is not specified.

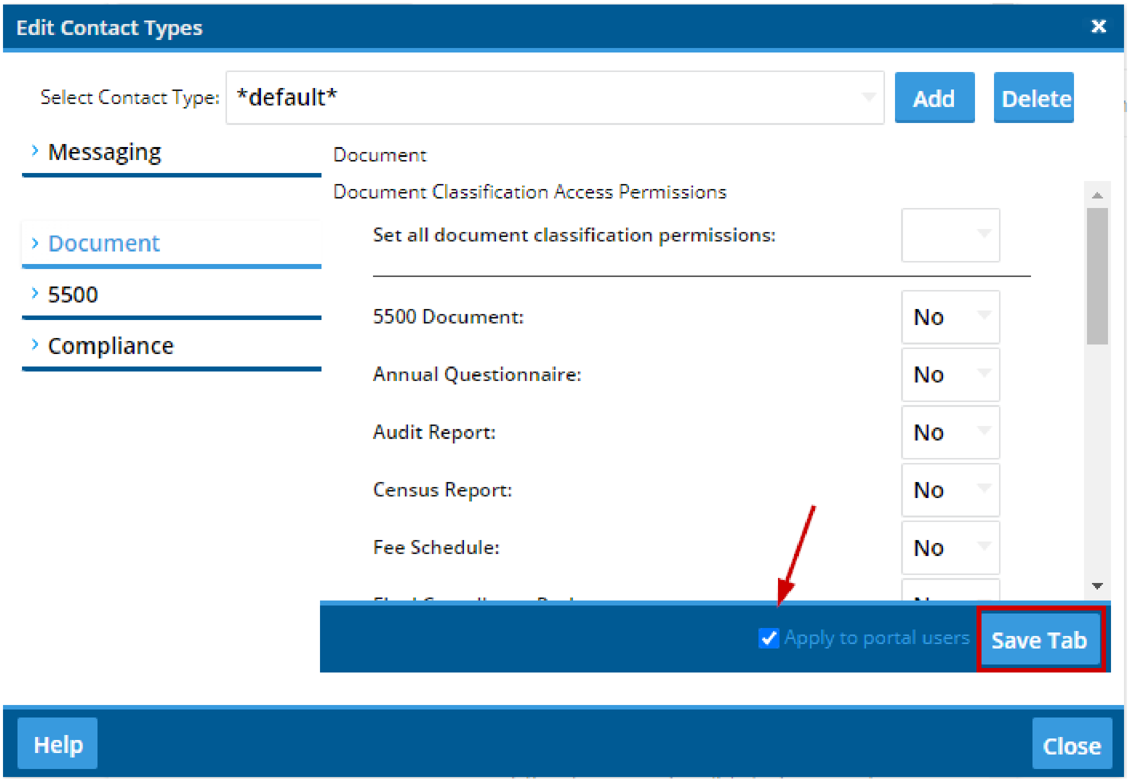


Additional contact types will appear if the drop down is selected. The existing contact types may be edited or a custom contact type may be created.



Updated permissions to existing contact types may be applied to existing portal users that currently have that contact type listed on the Edit Portal User Screen.

To apply the changes to current portal users in the system, check the "Apply to portal users" box before clicking on "Save Tab". A window will pop up to select all portal users of that specified type, or select specific users to update.



Contact Types may also be added or deleted by selecting the applicable button to the right of the drop-down list. If deleting a contact type, be sure to select the specific contact type from the drop down prior to selecting the 'Delete' button.