Create a new Authorized Contact

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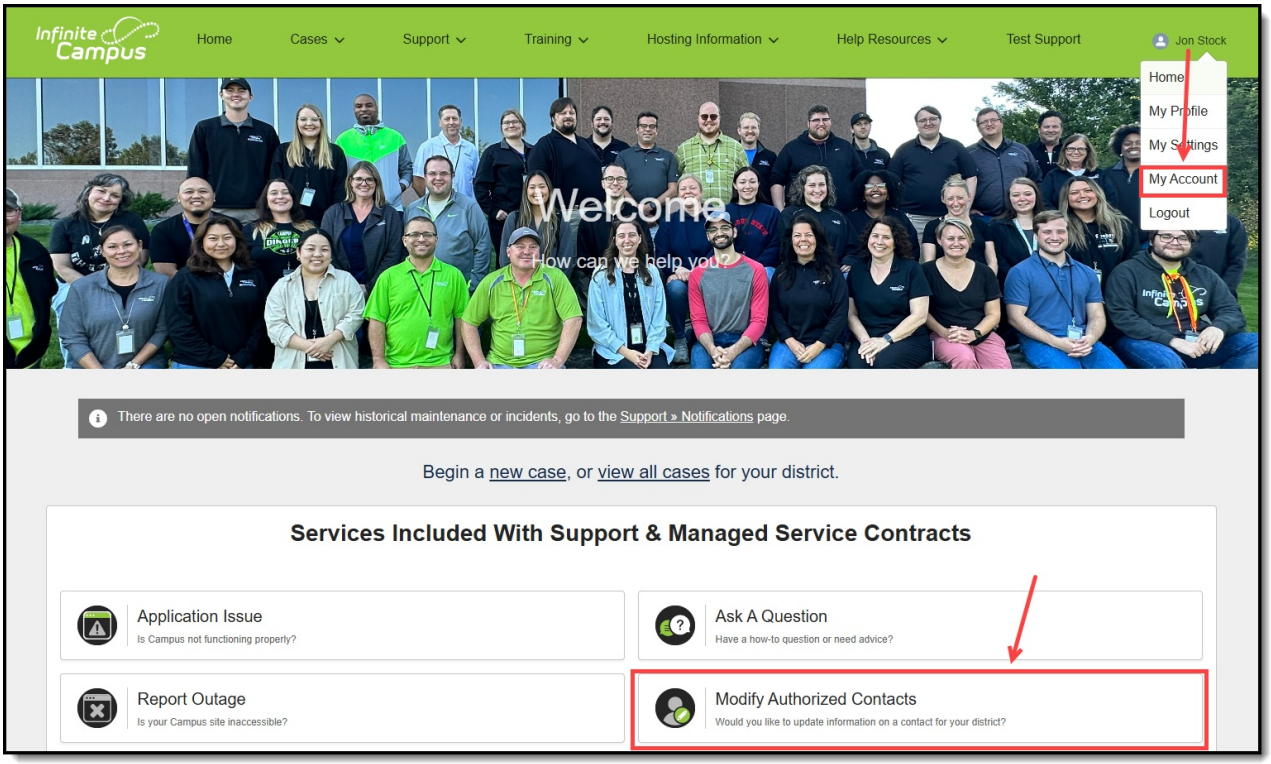
This guide explains how to create a new Authorized Contact in the Support Portal.

Before you start

- You must have access to the Support Portal.
- You must be an active contact who is a Technical Contact or a Support Contact for the customer account. This information can be found under the Support Access field in your contact record. Any other level of support access cannot perform the steps in this guide.
- Each district has authorized contact limits that govern the total number of users who can be added in the Contact Management tool.

Step 1 - Access the Contact Management tool

The first step is to locate the Contact Management tool within the Support Portal.

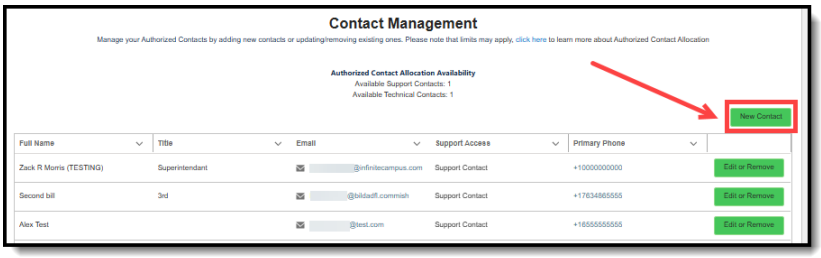


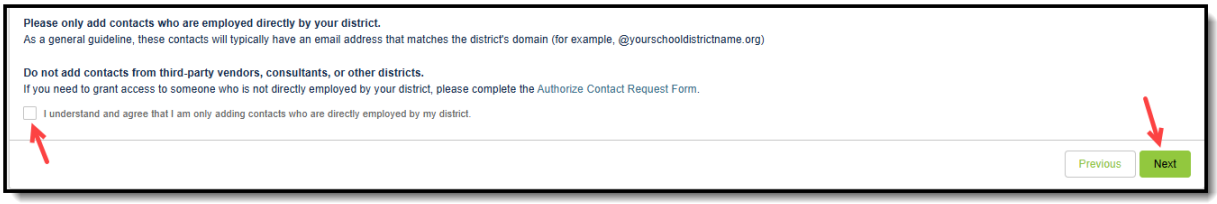
1. Log in to the Campus Support Portal.
2. Locate the Contact Manager by either:
    1. Selecting your profile icon in the upper right-hand corner and navigating to My Account > Account Information > Contact Manager
    2. Click **Modify Authorized Contacts** on the homepage or case creation page.

The Contact Management editor will appear.

Step 2 - Agree to the terms

The next step is to initiate the creation of the contact and agree to the terms.

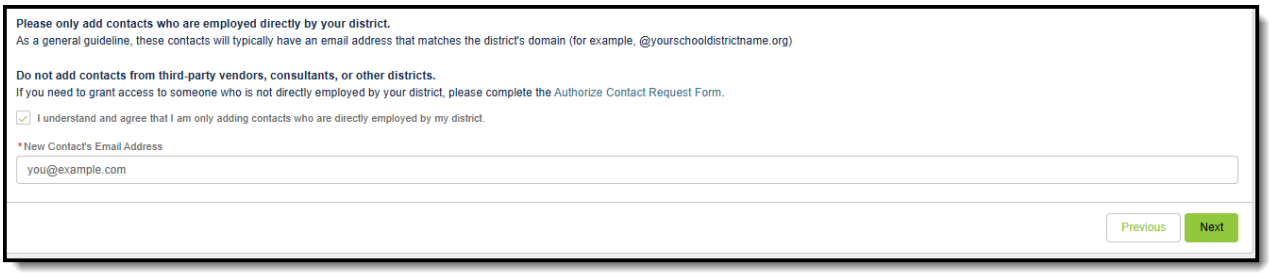




1. Click the **New Contact** button.
2. Review the terms, and if you agree, check the checkbox.
3. Select **Next**.

Step 3 - Check for existing accounts

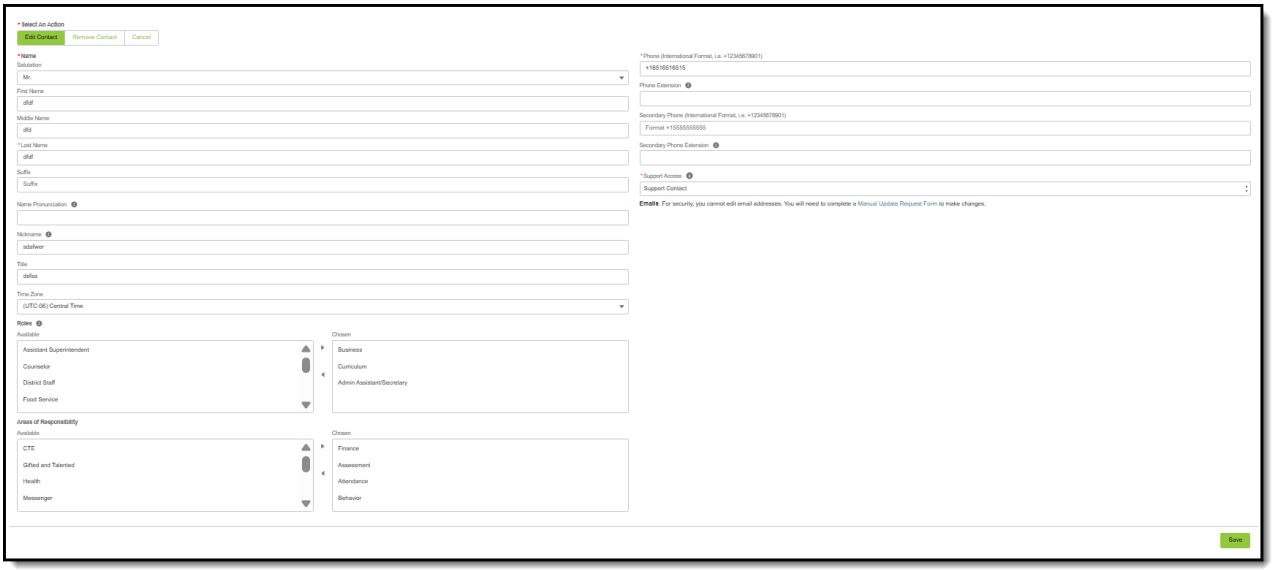
You now need to verify the user isn't already in the system before adding them.



1. Enter the **New Contact's Email Address**
2. Click **Next**. The system will check whether the user already exists.
    1. If an existing user is found for that email address, select the contact and click **Next**. The user's contact information will appear. Move on to Step 4 below.
    2. If the email is tied to an account that cannot be edited, a message will appear indicating it is unavailable. For further assistance, use the Authorized Contact Request Form.
    3. If no match is found and the user is new to the system, you will be sent to the Edit Contact screen. Move on to Step 4 below.

Step 4 - Create a new contact

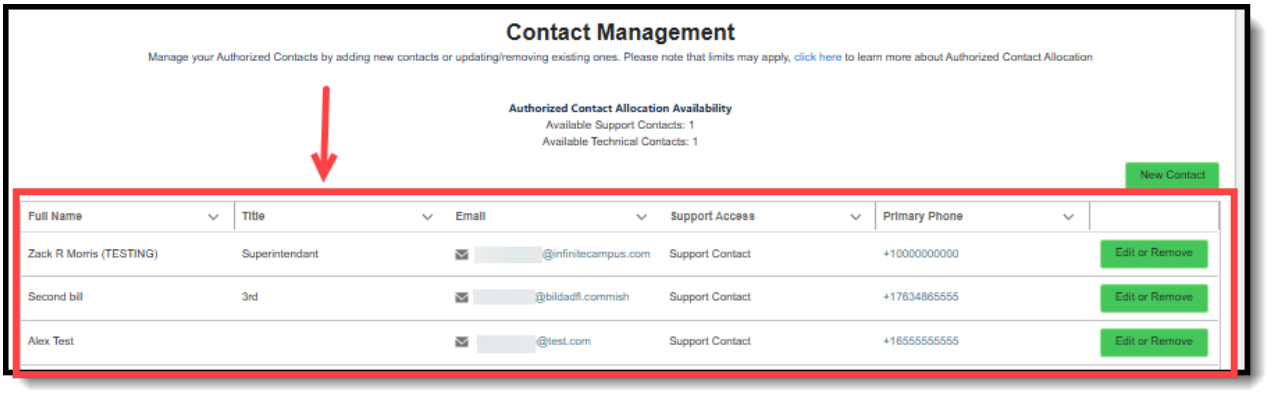
Now that you have either identified an existing user who will become an Authorized Contact or created a new user, you need to enter their information.



1. Enter the person's information; the more complete, the better.
2. Click **Save**.

Impact

The user is now an Authorized Contact and will appear in the Contact Management tool's list of contacts.



What's next

You've completed this task. There are no additional steps.